DOCUMENT RESUME

ED 272 768 CE 044 949

AUTHOR	Scanlan, Craig L.
TITLE	Deterrents to Participation: An Adult Education Dilemma. Information Series No. 308.
INSTITUTION	ERIC Clearinghouse on Adult, Career, and Vocational Education, Columbus, Ohio.
SPONS AGENCY	Office of Educational Research and Improvement (ED), Washington, DC.
PUB DATE	86
CONTRACT	400-84-0011
NOTE	75p.
AVAILABLE FROM	National Center Publications, National Center for Research in Vocational Education, 1960 Kenny Road, Columbus, OH 43210-1090 (Order No. IN308, $7.00).
PUB TYPE	Information Analyses - ERIC Information Analysis Products (071)
EDRS PRICE	MF01/PC03 Plus Postage.
DESCRIPTORS	*Access to Education; *Adult Education; Demography; *Educational Attitudes; Individual Characteristics; Learning Motivation; *Participant Characteristics; *Participation; Psychological Characteristics

ABSTRACT

This monograph examines factors associated with adults' nonparticipation in organized learning. A deterrent to participation is defined as a reason contributing to an adult's decision not to engage in learning activities. First, existing models and theories that attempt to explain participation behavior are described. These include three recent approaches that attempted to combine dispositional, situational, and environmental factors into composite models of participation: Rubenson's Recruitment Paradigm, Cross' Chain-of-Response Model, and Darkenwald and Merriam's Psychosocial Interaction Model. The literature review explores the effect on participation of demographic and sondemographic variables. Because the research shows that these variables of and by themselves are not deterrents to participation, the monograph explores the evolution and refinement of the factors affecting educational participation and concludes that (1) "deterrents" is a multidimensional concept encompassing clusters of variables; (2) these variables are influenced by the prospective learners' perceptions of their magnitude; and (3) the impact of these variables on behavior varies according to individual characteristics and life circumstances. The last section addresses strategies to overcome these deterrents, including specific examples of successful approaches to stimulating participation, particularly among reentry women, the elderly, the educationally disadvantaged, and rural adults. A nine-page list of references concludes the document. (SK)

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ED272768

Information Series No. 308

Deterrents to Participation An Adult Education Dilemma

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The National Center for Research in Vocational Education
The Ohio State University
1960 Kenny Road
Columbus, Ohio 43210-1090

1986

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Telex: 8104821894

Funding Information

Project Title:	ERIC Clearinghouse on Adult, Career, and Vocational Education
Contract Number:	NIE-C-400-84-0011
Act under Which Administered:	41 USC 252 (15) and P.L. 92-318
Source of Contract:	Office of Educational Research and Improvement U.S. Department of Education Washington, DC 20208
Contractor:	The National Center for Research in Vocational Education The Ohio State University Columbus, Ohio 43210-1090
Acting Executive Director:	Chester K. Hansen
Project Director:	Susan Imel
Disclaimer:	This publication was prepared pursuant to a contract with the Office of Educational Research and Improvement, U.S. Department of Education. Contractors undertaking such projects under Government sponsorship are encouraged to express freely their judgment in professional and technical matters. Points of view or opinions do not, therefore, necessarily represent official U.S. Department of Education position or policy.
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This publication was prepared with funding from the Office of Educational Research and Improvement, U.S. Department of Education, under Contract No. NIE-C-400-84-0011. The opinions expressed in this report do not necessarily reflect the position or policies of OERI or the Department of Education.

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Foreword

The Educational Resources Information Center Clearinghouse on Adult, Career, and Vocational Education (ERIC/ACVE) is one of 16 clearinghouses in a nationwide information system that is funded by the Office of Educational Research and Improvement, U.S. Department of Education. One of the functions of the clearinghouse is to interpret the literature that is in the ERIC database. This paper should be of particular interest to adult and continuing education practitioners, administrators, policymakers, and researchers.

The profession is indebted to Craig L. Scanlan, Associate Dean for Academic and Clinical Affairs, University of Medicine and Dentistry of New Jersey (UMDNJ), for his scholarship in the preparation of this paper. Prior positions Dr. Scanlan has held include staff therapist in the respiratory therapy departments of three hospitals, director of the respiratory therapy program at Brookdale Community College, research assistant at the Center for Adult Development at Rutgers University, and Chairman of the Department of Health Education, Evaluation, and Research at UMDNJ. He has served on the editorial boards of the *Adult Education Quarterly*, the *Journal of Allied Health*, and *Pulmonary Medicine and Technology*, and has written a number of publications on the education of allied health personnel and on aspects of continuing professional education.

The National Center wishes to acknowledge the leadership provided to this effort by Dr. Robert E. Taylor, recently retired Executive Director. Recognition is also due to Thomas Valentine, Assistant Professor of Adult Education, Syracuse University; Edward Jones, Coordinator of Inservice Training, George Mason University; and to John F. Littlefield, Research Specialist, and David Kalamus, Graduate Research Associate, the National Center for Research in Vocational Education, for their critical review of the manuscript prior to publication. Wesley Budke and Susan Imel coordinated the publication's development, assisted by Sandra Kerka and Cheryl Harrison. Jean Messick, Clarine Cotton, and Sally Robinson typed the manuscript; Janet Ray served as word processor operator. The paper was edited by James Bow of the National Center's Editorial Services.

Chester K. Hansen
Acting Executive Director
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in Vocational Education

Executive Summary

Unlike its childhood counterpart, adult education is mainly a voluntary activity. The fact that only some adults engage in educational activities would be of little consequence were it not for the needs and expectations of society. However, changing socioeconomic, cultural, and demographic forces as well as the democratic ideal of equal opportunity cause educational nonparticipation among adults to be treated as a social issue.

This monograph examines factors associated with adults' nonparticipation in organized or other-directed learning. In this context, a deterrent to participation is defined as a reason or group of reasons contributing to an adult's decision not to engage in learning activities.

The first step in examining deterrents to participation is a close look at existing models and theories that attempt to explain participatory behavior. Early explanatory models developed by Knox and Videbeck (1963) and Miller (1967) attributed variations in participation to the interaction of one's subjective orientation toward participation and the objective organization of one's "lifespace." The economic model proposed by Dhanidina and Griffith (1975) proposed that participation is most likely when the perceived benefits outweigh the costs. Other theories identified the contribution of attitudes and expectations toward participation in education.

Three recent approaches attempted to combine dispositional, situational, and environmental factors into composite models of participation: (1) Rubenson's (1977) recruitment paradigm, (2) Cross' (1981) Chain-of-Response model, and (3) Darkenwald and Merriam's (1982) Psychosocial Interaction Model.

These theories and models imply that a variety of variables are associated with participatory behavior. The literature reviewed in this monograph describes the effect on participation of such demographic variables as age, sex, income, race, educational attainment, employment status, and geographic location. Nondemographic variables are categorized as situational—associated with individual life circumstances, particularly in terms of career and social roles; dispositional—associated with values, attitudes, beliefs, or opinions; or psychological—associated with individual psychological or personality traits.

However, the research evidence shows that demographic and nondemographic variables of and by themselves are not deterrents to participation. The monograph explores the evolution and refinement of the factors affecting educational participation and concludes that (1) "deterrents" is a multidimensional concept, encompassing clusters of variables; (2) these variables are influenced by the prospective learners' perceptions of their perceived magnitude; and (3) the impact of these variables on behavior varies according to individual characteristics and life circumstances.

Eight categories of deterrence factors are outlined:

1. Individual, family, or home-related problems
2. Cost concerns
3. Questionable worth, relevance, or quality of educational opportunities
4. Negative educational perceptions, including prior unfavorable experiences
5. Apathy or lack of motivation
6. Lack of self-confidence
7. A general tendency toward nonaffiliation
8. Incompatibilities of time and/or place

The last chapter addresses strategies to overcome these deterrents. First, general guidelines are derived from the work of Cross (1981), who applied the concepts underlying participation theory; and Beder (1980), who developed a marketing approach to adult education programming. Next are provided specific examples of successful approaches to stimulating participation particularly among reentry women, the elderly, the educationally disadvantaged, and rural adults. These successful programs are characterized by the careful planning, selection, and design of appropriate methods of recruitment and programming; use of theoretical knowledge of participation and its practical manifestations (e.g., marketing); and attention to the needs, expectations, concerns, and characteristics of the prospective clientele.

Information on deterrents to participation can be found in the ERIC system using the following descriptors: *Access to Education, *Adult Education, Demography, *Educational Attitudes, Individual Characteristics, Learning Motivation, *Participant Characteristics, *Participation, Psychological Characteristics. Asterisks indicate descriptors having particular relevance.

Introduction

The predominant values characterizing our society's orientation toward education have always been instrumental in nature. In this context, education traditionally is viewed in utilitarian terms as a means to an end. For the individual, this end may be cultivation of the intellect, acquisition of specific skills, or, in the broadest sense, personal growth and self-actualization. For society at large, education serves to promote or catalyze improvements or change in our collective existence. From the progressivist perspective, these individual and societal ends are inextricably related one to the other, such that individual development ultimately must serve the purposes of the social order (Hallenbeck 1964).

Unlike its childhood counterpart, adult education is mainly a voluntary activity, chosen by autonomous learners willing or able to forfeit time and/or money to realize some explicit or implicit goals. That not all adults engage in such activities would be of little consequence were it not for the larger needs and expectations of society as a whole. However, given the inevitable impact of changing socioeconomic, cultural, and demographic forces on the expectations society places upon its members, it is little wonder that educational nonparticipation among adults is treated as a social issue (Cross 1983; Darkenwald and Merriam 1982; Organisation for Economic Cooperation and Development 1979). Moreover, our society has always valued highly the democratic ideal of equal opportunity for its members. To the extent that education serves to open opportunities, and to the extent that some individuals or groups are constrained from realizing its benefits by circumstances beyond their control, society has an obligation to address these barriers and provide comparable access to all.

Policy issues notwithstanding, the problem of nonparticipation is of substantial practical consequence to adult education providers. To the extent that the effectiveness and very survival of a provider can depend upon its ability to reach its targeted clientele and garner their participation (Darkenwald and Merriam 1982), a knowledge of barrier or deterrent factors becomes crucial in program planning and development. Indeed, as subsequent examples will show, agencies that purposefully attend to the constraints affecting their prospective clientele are most successful in reaching those otherwise unwilling or unable to participate.

Overview

How serious a concern nonparticipation in adult education is and to what extent barriers or deterrent forces contribute to the problem is contingent, in part, upon the meaning one ascribes to these concepts.

In terms of participation, the broader the definition applied to adult education, the greater the reported rate of activity. Defining adult learning generically as a sustained, highly deliberate

effort to acquire knowledge or a skill, and employing an intensive probing interview, Tough (1979) reported that 98 percent of his research sample were engaged in educational activity. When adult learning is more narrowly defined as "courses and organized educational activities taken part-time" (Kay 1982, p. 1), only 13 percent of those sampled reported participation during the prior year. Of course, this disparity strikes at the heart of the debate over the priority given to formal (other-directed) versus self-directed learning by adult education providers, and it raises crucial questions regarding one's conception of barriers or deterrents to engaging in adult learning activities.

Without attempting to draw value judgments on the appropriateness of one form of learning over another, this monograph will limit its perspective to factors associated with adults' nonparticipation in *organized or other directed learning*, that is, learning conducted under the auspices of a formally constituted organization or group in which an external educational agent assumes responsibility for all or most of the activity's planning, implementation, and evaluation (Garry 1977). In this context a *deterrent* to participation represents a reason or related group of reasons contributing to an adult's decision not to engage in organized or other-directed learning activities. Conceptually included in this broad definition are both extrinsic factors making it difficult or impossible for an adult to participate in a desired activity *and* intrinsic factors—values, attitudes, perceptions, or dispositions—limiting one's motivation or proclivity to engage in a learning activity.

In this context, and underlying the approach taken in this monograph, are three basic assumptions: (1) adults' characteristically low rates of participation in organized educational activities are problematic to society, (2) certain factors or deterrents contribute to this widespread phenomenon of nonparticipation, and (3) only by identifying and addressing these factors can providers fulfill their social role and reverse the growing disparity between the educational "haves" and "have-nots."

Purpose and Approach

The purpose of this monograph is to review and synthesize the current body of knowledge on deterrents to participation in adult education. It is intended to provide adult educators, policymakers, and scholars with the information necessary to address the problem from both a research-oriented and a practice-oriented perspective.

To these ends, we will look first at the existing models, paradigms, and theories that attempt to explain participatory behavior. Next, we will explore the literature describing the variables associated with adults' nonparticipation in educational activities, attempting to correlate these findings with theoretical expectations. Thereafter, we will look directly at the evolution and refinement of our knowledge regarding what adults report as deterrents to engaging in formal learning. We will attempt to synthesize this information in ways useful to providers intent upon addressing these barriers and constraints.

Based upon this foundation, we will conclude our analysis with a careful review of existing guidelines for addressing deterrents to participation and a detailed exploration of successful efforts to minimize or overcome their impact among four selected groups of "hard-to-reach" adults.

Theoretical Foundations

The tendency of adults to engage or not to engage in educational activities represents a complex phenomenon of human behavior. Understanding such behavior requires the conceptual guidance provided by models, theories, or paradigms. Good theory is practical to the extent that it helps to identify pertinent variables and explain relationships among them. Moreover, theoretical models provide a basis for testing assumptions and hypotheses regarding a phenomenon. In addition, good theory can help explain why some practices succeed while others fail to achieve their desired ends.

Over the last 25 years, several scholars have proposed models that attempt to explain why adults participate or fail to participate in educational activities. In the following review of these models, emphasis is placed upon their common elements and the extent to which they incorporate barriers or deterrents to participation as pertinent variables. This section concludes with a synthesis of existing theory and its implications for identifying and addressing deterrents to participation in adult education.

Early Explanatory Models

The first major effort to explain the relationship between the situational, social, and psychological antecedents of participation in adult education is attributable to Knox and Videbeck (1963). They viewed the educational activity of adults as one of many closely related "participatory domains" characterizing the general phenomenon of social participation. A "participatory domain" was defined as a cluster of participatory acts and social relationships related to a single life role. Such acts were considered *patterned* if they grouped together to form a meaningful whole and were systematically recurrent. According to their theory of patterned participation, variations in participation could be attributed to the interaction occurring between one's subjective orientation toward participation and the objective organization of one's lifespace. The objective organization of an individual's lifespace was conceptually defined to include the following components: one's role and status configuration, the availability of participatory opportunities, *and* the personal strictures and environmental restraints influencing one's participatory alternatives.

As a corollary to this general formulation, and in concert with existing sociological and psychological perspectives on adult development, Knox and Videbeck additionally proposed that participatory behavior was responsive to changes in life circumstances. According to their framework, such "alternative participatory responses" could affect changes in participation in a solitary participatory domain or simultaneously influence behavior in many domains.

A test of their theory with 1,500 adults provided general support for the hypothesized relationship between variations in status configuration and activity in both the adult education and

voluntary association participatory domains. Moreover, a subsequent national survey (Aslanian and Brickell 1980) has confirmed the hypothesized relationship between changes in life circumstances and participation in adult education. Unfortunately, the potential impact of personal and environmental "strictures" specified in the Knox and Videbeck model were never addressed.

Soon thereafter, Miller (1967) elaborated upon the supposition that participant behavior could be explained in terms of variables interacting within an individual's lifespace. Employing Lewin's field theory as a basis for interpreting the constellation of forces constituting an adult's psychological and social environment, Miller postulated that educational activity (or lack thereof) represented a behavioral outcome of the dynamic interplay between personal needs and social structures. He theorized that the valence and direction of such forces determined both the likelihood and nature of participant behavior. According to his conceptual framework, when both needs and social structures (social class value systems, technological change, and association structures) drive an individual toward an educational objective, the likelihood of participation in educational activity pertinent to achieving that objective should be high. When needs drive a person toward an objective but are not complemented by sustaining social forces, participation is likely to be either erratic or nonexistent. When personal needs lack strong positive valence but social structures operate to encourage participation, educational activity will initially be intense, but will quickly diminish. Finally, when needs and social structures oppose one another, the likelihood of conflict is high and, although participation may in fact occur, disequilibrium and tension will supervene.

Miller expounded upon these relationships by providing intuitive formulations of forces acting upon groups of differing socioeconomic status. Implicit in his conception of "restraining forces" was the potential impact of individual or environmental deterrents to adults' participation in educational activities.

Foregoing complex analyses of psychosocial variables as predictors of adult engagement in recurrent learning efforts, Dhanidina and Griffith (1975) proferred a rationalistic economic model of participant decision making. According to their formulation, participation in occupationally related adult education (General Educational Development [GED] preparation in their example) represents an investment in one's human capital. The decision to participate can therefore be analyzed in terms of the costs and benefits of such investment. Incurred costs associated with continuing education include direct outlays for tuition, materials, and transportation, as well as the economic value of the time invested in learning (opportunity cost). Potential benefits of participation consist mainly of the augmented present or future value of productive earning capabilities associated with acquisition of salable new knowledge or skills. By implication, participation in continuing education is most likely when the perceived benefits of such an investment outweigh the costs.

Although a test of these relationships proved inconclusive, the underlying conceptual framework of the economic model of decision making is logically appealing and may be particularly relevant as a basis for explaining variations in job-related continuing education activity (Darkenwald 1980). Tentative support for inclusion of the economic model as a component of a broader decision-making process has been provided by Smorynski and Parochka (1979). Assessing the factors influencing the continuing education activity of health professionals in northern Illinois, the researchers constructed a model of participant decision making that included the following elements: (1) an individual's assessment of the quality features and essential utility of the offering, (2) consideration of program convenience factors, (3) evaluation of the compatibility of the program with one's work situation, and (4) a cost-benefit analysis of program worth. Of particular importance was the finding that the cost of attending programs (relative to the worth of the offerings) was considered a "constraint factor," that is, a reason for not participating in con-

tinuing education. To the extent that the rationalistic/economic model acknowledges cost (versus benefit) as a potential deterrent to participation, its usefulness in explaining variations in participation is enhanced.

Dispositional Paradigms

That the decision to participate in adult education may, in part, be explained by individuals' psychological orientations toward such activity has long been assumed (Adolph and Whaley 1967). The actual incorporation of attitudes within an adult education participatory model was first attempted by Seaman and Schroeder (1970). Relying heavily upon previously formulated social-psychological theory, they suggested that the structure of an attitude could be explained in terms of the relationship among its cognitive, affective, and behavioral components. In such context, the behavior of an individual toward an object is attributable to (1) the various interrelationships between these attitudinal components, and (2) the influence of the immediate situation. According to this formulation, attitudes are conceptualized as intervening variables that, aroused by appropriate situational cues and linked to the personal characteristics of the individual, determine behavior.

Although a test of their model did demonstrate a positive relationship between attitudes toward adult education and the extent of educative activity, this relationship did not pertain after the effects of age and educational level were factored out. Observing that most of the respondents in the sample indicated a relatively high positive attitude toward continuing education while scoring relatively low on the actual participation scale, Seaman and Schroeder concluded that

> there are factors, presumably situational in nature, other than those explicitly considered in this study, that do affect the influence which attitudes have on the extent of educative behavior. . . . This would seem to bear out the assumption that these factors were preventing the respondents from participating more often in educative behavior. (p. 105)

Working from the perspective that attitude toward continuing education represented only one of *many* dispositional components of behavior, Grotelueschen and Caulley (1977) applied the conceptual framework of Fishbein (1963, 1967) in the elaboration of a model to explain the determinants of intention to participate in continuing professional education. According to Fishbein's framework, attitudes are instrumental in predisposing a set of intentions toward behavior associated with an object. Behavior toward an object ultimately represents an overt manifestation of an individual's intention(s).

In concert with this framework, Grotelueschen and Caulley employed an expectancy-value function to quantify the differential contribution of dispositions toward participation in continuing education. They identified three key constructs as antecedents to participation: (1) an individual's attitude toward participation, (2) an individual's perception of the expectations of others toward his behavior (the subjective social norm), and (3) the expectations an individual imposes upon himself (the subjective personal norm). Following the quantification approach employed by Fishbein, the authors generated the following multivariate equation as a basis for predicting both intention to participate and actual participatory behavior:

$$B \sim I = w_1(A) + w_2(SSN) + w_3(SPN)$$

According to the formula, an individual's engagement in recurrent learning (B) is determined by his intention to participate (I). Behavioral intentions, in turn, are a function of the weighted

sum of one's attitude toward participation (A) and the perceived social (SSN) and personal (SPN) norms governing such behavior. Functionally, the more positive one's attitude toward participation and the greater the perceived support of social and personal norms, the stronger will be one's inclination to participate. Discrepancies between an individual's measured intention to participate and his or her actual behavior, according to the model's advocates, would be attributable to the presence of mitigating factors or obstacles.

That such "mitigating factors" were not included as operationalized components of the model may explain, in part, the subsequent inability of researchers to demonstrate its validity (Ray 1979; Southern 1980).

Composite Model of Participation

Recent efforts to explain the phenomenon of educational participation have employed complex formulations in which dispositional, situational, and environmental variable interaction is postulated to determine participation behavior. Notable among these composite or multivariate models of participation are those developed by Rubenson (1977), Cross (1981), and Darkenwald and Merriam (1982).

The Recruitment Paradigm

Integrating the general concepts of expectancy-valence models within the larger framework of cognitive motivational theory, Rubenson (1977) proposed a "recruitment paradigm" of participation in adult education. As depicted in figure 1, the model portrays participation behavior as contingent upon the multiple interaction of both personal and environmental variables operating within an adult's lifespace.

Among the personal variables considered in the model are the individual's prior experience, "congenital properties" (personal attributes), and current needs (developmental tasks confronting one during the life cycle). Environmental factors conceived as central to the formulation include the following: the degree of "hierarchical structure" of the individual's lifespace (environmental constraints determining one's control over one's situation), the norms and values of individuals and their reference group(s), and the available "study possibilities" (poorly defined, but interpreted as institutional facilitators or impediments to continuing education).

In concert with cognitive theories of motivation—and central to understanding the paradigm—is the assumption that these "first order" personal and environmental variables cannot, of and by themselves, explain participation behavior. Rather, the influence they exert upon behavior is mediated by the individual's response to their meaning, giving rise to an intermediate level of variables: (1) active preparedness, (2) the perception and interpretation of the environment, and (3) the experience of individual need(s). These intermediate variables, in turn, interact to determine both the perceived value of an educational activity (valence) and the probability of being able to participate in and/or benefit from a given learning episode (expectancy). Applying the multiplicative expectancy-valence function previously discussed, Rubenson argued that the product of these two "third order" variables ultimately determines the magnitude of the force motivating an individual to participate in recurrent learning efforts, and, by implication, the likelihood of observing such behavior.

Of particular relevance to the analysis of deterrents to participation is the model's emphasis on the perceptual (versus structural) components of the individual's lifespace. Implicit in this

perspective is the assumption that actual experiences, actual environmental structures, and actual individual needs are less important determinants of behavior than how they are differentially perceived and interpreted by the potential learner. This cognitivist perspective suggests that deterrents to participation (whether related to the internal "congenital properties" of the individual or the external constraints operating within the environment) should be conceptualized in terms of their perceived (rather than actual) frequency or magnitude of influence.

The Chain-of-Response Model

Noting important commonalities among prior theoretical formulations, Cross (1981) developed a composite Chain-of-Response model to help explain adults' participation in learning activities (figure 2). According to this model, an adult's participation in a learning activity should be conceived *not* as a single isolated act, but as a result of a complex chain of responses, each based upon the evaluation of the position of the individual in his or her environment.

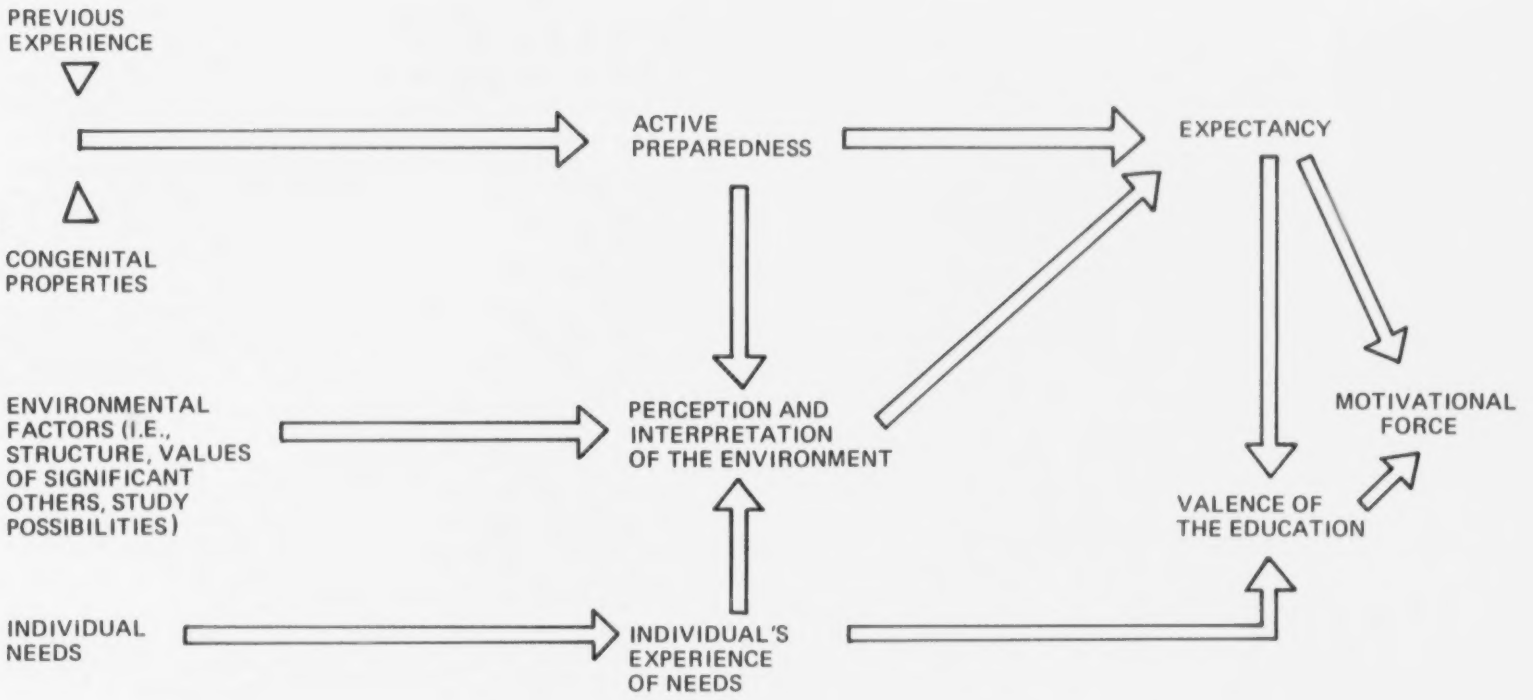
According to Cross, responses leading to participation tend to originate within the individual; these are represented in the model as the interrelated concepts of self-evaluation (A) and attitude toward education (B). Impinging upon both of these internal psychological variables are the social, environmental, and/or experiential factors typically conceived as antecedents of one's self-concept and dispositional orientation toward outside objects. Among such antecedents are the potential effect of prior participation upon one's self-concept and one's attitude toward continuing education (as indicated by the return loop from participation to A and B).

According to the model, these internal psychological variables interact with and influence both the valence attributable to and the expectancy associated with a participatory act (C). The expectancy and valence associated with a participatory act is further conceived to be influenced by the life transitions and associated developmental tasks confronting the individual during specific phases of the life cycle (D.) Interaction of these internal psychological and external social and environmental variables determine the motivational force for participation in a particular learning episode.

At this point in the continuum (assuming that prior variable interactions result in motivating the individual for participation), the potential learner responds to the relevant opportunities and barriers associated with pursuit of a particular educational objective (E). According to Cross, the extent to which such factors influence the likelihood of subsequent participation is determined, in part, by the differential effect of motivation upon the individual's perception of these variables and the nature of the information available for decision making (F).

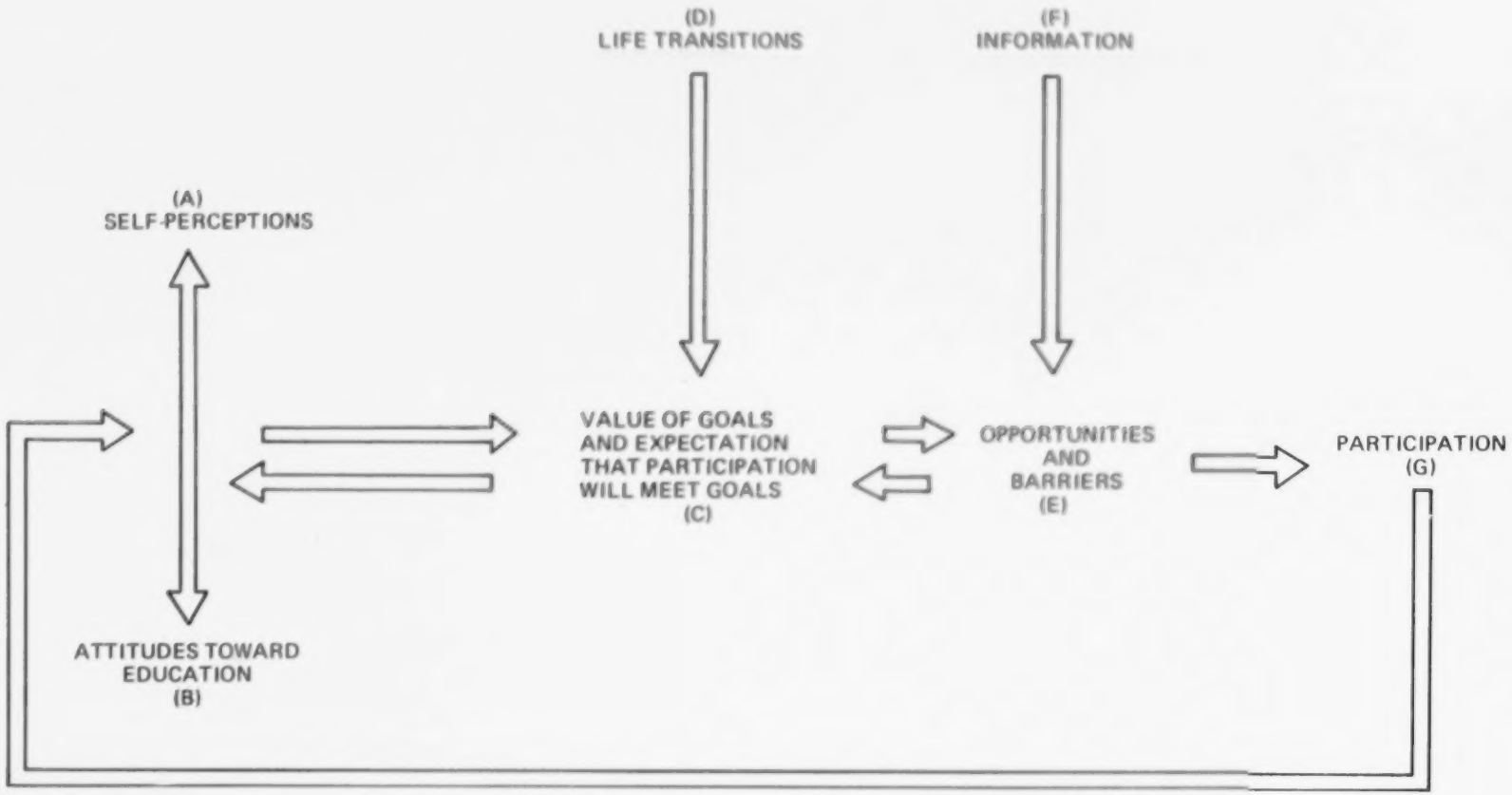
In incorporating the common elements of prior theory within her model, Cross reaffirmed the cognitivist orientation toward participatory behavior. Implicit in this orientation is the important assumption that the components of such behavior can best be understood and articulated by those actually making the decision.

Of additional relevance is the ordering of the variables in the Chain-of-Response model, from mainly internal psychological forces to mainly external social and environmental factors. Cross implied that the internal psychological variables such as self-concept and attitude toward education are critical determinants of how the individual perceives, interprets, and responds to the arrays of elements constituting his or her "field." Such a perspective reinforces the need to scrutinize the perceptual (as well as the structural) elements of prospective learners' decision making.



SOURCE: Adapted from Rubenson (1977)

Figure 1. Rubenson's Recruitment Paradigm



SOURCE: Adapted from Cross (1981).

Figure 2. Cross's Chain-of-Response Model

Last, and of most importance, is the fact that Cross is the only theorist thus far discussed to elaborate upon the concept of barriers to participation. Drawing heavily upon the existing national survey data bases (Carp, Peterson, and Roelfs 1974; Johnstone and Rivera 1965), Cross formulated a hypothetical barriers structure consisting of three major categories: *situational barriers* (those arising from one's situation in life at a given time), *institutional barriers* (those practices and procedures that exclude or discourage adults from participating in organized learning activities), and *dispositional barriers* (those related to the attitudes and self-perceptions about oneself as a learner). Clearly, her suggestion that the barriers or deterrents construct may include several underlying dimensions represents a first step toward their identification and elaboration.

The Psychosocial Interaction Model

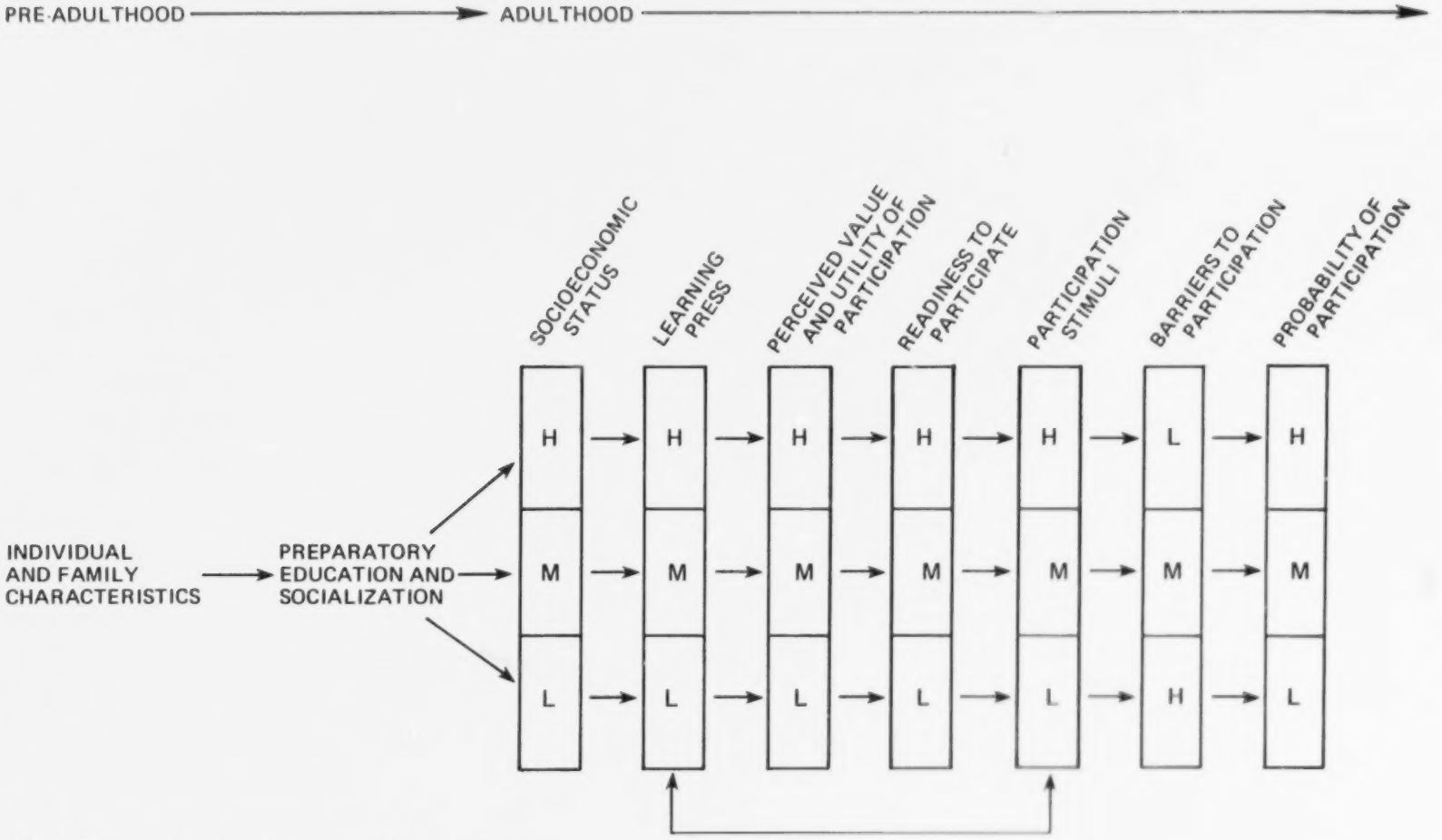
The most recent theoretical formulation designed to explicate adult participation in continuing education is the Psychosocial Interaction Model proposed by Darkenwald and Merriam (1982). Like that developed by Cross, the Psychosocial Interaction Model represents an abstract synthesis of prior formulations and has been explicitly designed to facilitate the testing and development of more concrete elements of theory.

As depicted in figure 3, the model shares Cross' conception of participatory behavior as determined by a continuum of responses to both internal and external stimuli; of significant difference, however, is the model's emphasis on the determinants of adult behavior, particularly those related to socioeconomic status. Adult socioeconomic status is conceptually portrayed as the first and most dominant of the variables constituting the model's continuum. Its potential effect upon participation is viewed as mediated by the "learning press" of the individual's environment, that is, the extent to which one's environment requires or encourages further learning. The integral relationship between socioeconomic status and learning press is based upon configuration elements common to each, such as general social participation, occupational complexity, and life-style.

Progressing in the continuum to the intermediate level variables (perceived value of adult education and readiness to participate), one notes a reorientation from an emphasis on social and environmental determinants of behavior to the individual and psychological forces affecting educational participation. Conceptually, Merriam and Darkenwald argued that a particular learning press will foster certain attitudes and perceptions toward the value and utility of adult learning. By implication, environments that encourage continuing education will tend to foster positive perceptions toward its value or utility. The greater the perceived value of continuing one's education, in turn, the more favorable will be one's disposition for or readiness to participate.

The likelihood of participation is further conceived as dependent upon the perceived frequency and intensity of participation stimuli. In the context of the model, such stimuli may represent either discrete external "trigger events" (such as a job change) or generalized internal drives or desires (such as a desire for self-improvement). The arrow in figure 3 connecting participation stimuli and learning press portrays the hypothesized interrelationship between the extent to which one's environment encourages learning and the perceived magnitude of participation stimuli.

The last element in the model's continuum, barriers to participation, represents the final determinant of participatory behavior. According to the model's advocates, such barriers may preclude learner engagement in educational activities, even in the presence of potent participation



SOURCE: Adapted from Darkenwald and Merriam (1982).

Figure 3. The Psychosocial Interaction Model

stimuli. Elaborating upon Cross' classification framework, Darkenwald and Merriam hypothesized four categories of barriers to participation: situational, institutional, psychosocial, and informational. The conceptual definitions they provided for the situational and institutional categories of barriers are roughly equivalent to those espoused by Cross.

The psychosocial category subsumes Cross' narrow perspective on dispositions regarding oneself as a learner within the larger context of other relevantly conceived and socially determined beliefs, values, attitudes, and perceptions. This expanded conception of psychosocial barriers emphasizes the potential learner's negative attitude toward the utility, appropriateness, and pleasurability of engaging in educational activities, as determined, in part, by socioeconomic status factors.

The model's emphasis on status configurations variables as major determinants of participatory behavior is further evidenced by the inclusion of informational barriers as a fourth category of impediments to adult learning. Observing that the literature has consistently shown a direct relationship between levels of awareness of educational opportunities and the socioeconomic status of the population(s) studied, Darkenwald and Merriam cogently argued for the consideration of informational or communication variables as an additional category of barriers to participation.

Like the paradigm developed by Cross, the Psychosocial Interaction Model posited by Darkenwald and Merriam builds upon and refines many of the prior theoretical assumptions underlying our conception of adult educational participant and nonparticipant behavior. Its emphasis on the impact of status configuration variables upon such behavior reiterates both the theoretical assumptions of Knox and Videbeck (1963) and the practical findings of subsequent descriptive research. The hypothesized interrelationships between status configuration variables, learning press, and perceptions regarding the value and utility of adult education and the magnitude and intensity of participation stimuli reinforce the potential importance of the perceptual (versus the structural) components of an individual's lifespace as determinants of participation behavior. Lastly, the elaboration of four categories of barriers to participation implies that the underlying structure of those factors deterring adults from participating in continuing education may indeed be complex.

Implications of Participation Theory

Notwithstanding differences in their theoretical context, psychosocial orientation, and application, the existing models, paradigms, and theories of participation share two general assumptions: (1) participatory behavior is a function of the interaction of both individual and environmentally determined variables, and (2) such variables may interact so as to enhance or inhibit the likelihood of participation.

In regard to deterrents to participation in adult education, inferences synthesized from these various theoretical perspectives support several more specific assumptions:

1. The deterrents concept probably constitutes a multidimensional construct.

2. The dimensions of the construct may include groupings of psychologically, socially, and environmentally determined variables.

3. Deterrents to participation themselves (the structural component of the construct) may be less important determinants of behavior than how they are differentially perceived and interpreted by the individual (the perceptual component of the construct).

4. The perception and interpretation of deterrents to participation may be influenced by other important and pertinent psychosocial and environmental variables.

5. Deterrents may directly affect participatory behavior or, alternatively, may indirectly mediate between other influential antecedents of participation.

6. Deterrents to participation (whether conceptualized structurally or perceptually) may differ according to the personal characteristics and life circumstances of the individual.

7. According to the personal characteristics or life circumstances of the individual, deterrents may often represent the *absence* of enabling factors as well as true barriers or obstacles to participation.

8. Deterrents to participation in continuing education may represent generic influences upon behavior to other participatory domains.

9. The elements constituting the dimensions of the deterrents constructs are probably best understood and articulated by those actually making the decision to engage or not engage in continuing education.

Whether or not such assumptions are indeed supported by the findings of applied participation research (and the extent to which these findings coincide with our theoretical expectations) are addressed in the next section.

Variables Associated with Participatory Behavior

The validity of these various theoretical perspectives and the usefulness of the deterrents construct in explaining adult education activity can only be assessed in light of our current knowledge of the variables associated with participatory behavior.

Variables associated with the educational participation of adults may be broadly categorized into those used to describe the *demographic* characteristics of a population and those pertaining to the *nondemographic* attributes of its individuals. Demographic variables represent the vital characteristics of an individual group or population, such as age, sex, income, and educational attainment. Nondemographic variables subsume people's situational, dispositional, and/or psychological characteristics. Situational variables are descriptive attributes associated with the life circumstances of individuals, especially those pertaining to their careers, societal roles, or social support systems. Dispositional variables are attributes associated with the expressed values, attitudes, beliefs, or opinions of people. Psychological variables represent measures of individual psychological traits or personality factors.

Demographic Variables

Current knowledge of the relationship between demographic variables and adults' participation in organized continuing education is based upon more than a quarter century of national cross-sectional survey research. Booth's (1961) analysis of the U.S. Bureau of Census 1957 Current Population Survey data provided the earliest nationwide perspective on the relationship between the demographic characteristics of American adults and their participation behavior. Emphasizing the demographic patterns associated with *nonparticipation*, Booth concluded that adults not engaging in organized continuing education were typically older, less well educated, and more likely to work in an unskilled or semiskilled occupation than those who did participate. He additionally observed that nonparticipants appeared in disproportionately greater numbers among females than males, among rural residents than urban dwellers, and among nonwhites than whites, regardless of educational achievement.

Employing a somewhat broader definition of educational activity (which included independent study), Johnstone and Rivera (1965) conducted a comprehensive four-phase survey investigation into the nature and magnitude of American adults' participation in continuing education. Using a national probability sample of almost 13,000 households and collecting data on nearly 24,000 adults, the researchers provided the first detailed and representative analysis of the demographic characteristics of the adult learner.

In concert with Booth's findings, Johnstone and Rivera found nonparticipants to be disproportionately overrepresented among the older, less well educated, and rural dwelling segments of the adult population. When compared to the population as a whole, nonparticipants were more likely

to occupy positions in the lower social, economic, and occupational strata of society. In terms of the *relative* importance of the major demographic variables in distinguishing between active learners and those not engaging in educational pursuits, educational attainment, occupational status, and income (in that order) were considered most influential.

Contrary to the findings of Booth, no differences were demonstrated in the distribution of sexes according to participant status, although sex did appear to be associated with differences in the *types* of educational activities pursued by those sampled. Differences between nonparticipants and members of the population as a whole were also unremarkable in regard to both religious affiliation and marital status. Racial and ethnic differences were demonstrated; when controlled for educational attainment, however, such differences were interpreted as being insignificant.

Reviewing the implications of their findings, Johnstone and Rivera concluded that

> one of the most persistent findings emerging from this inquiry is that a great disparity exists in the involvement of continuing education of segments of the population situated at different levels of the social hierarchy. (p. 231)

Subsequent research has tended to reaffirm and support this conclusion, providing evidence of both remarkable consistency in findings across time and, more recently, the development of some potentially significant trends in participation behavior.

Encouraged by the Commission on Non-Traditional Study to update Johnstone and Rivera's findings, Carp, Peterson, and Roelfs (1974) conducted a systematic nationwide survey of adults' learning activities, interests, and needs. Although the definition of adult learning differed from those previously used, and no clear distinction was drawn between participants and nonparticipants (the categories used—"Learners" and "Would-be Learners"—were *not* mutually exclusive), the findings of Carp, Peterson, and Roelfs were generally consistent with the results of prior studies.

The researchers found Learners to be younger than the general adult population, better educated, and particularly well represented among the high status occupational groups. Although single people were more likely to be identified as Learners than those categorized as married, this difference was attributed mainly to the relatively young age of the "single" subsample. Blacks were slightly underrepresented among the Learners, as were those dwelling in rural areas, especially the South. Neither sex was found to be more oriented toward learning than the other. Job status of those sampled proved equally inconclusive; those working full time were slightly overrepresented among the Learners, while those with no job were slightly underrepresented in this category. Demographic characteristics of the survey sample were also observed to be useful in distinguishing between the learning interests of Would-be Learners and the actual fields of study engaged in by those categorized as Learners.

Corroborating evidence in support of these private sector research efforts has been regularly provided by the National Center for Education Statistics (NCES) in its Triennial Surveys of Adult Education. Despite the more narrowly focused conception of educational activity than that employed by either Johnstone and Rivera or Carp, Peterson, and Roelfs, the general findings of the NCES studies tend to validate prior observations on the relationships between demographic characteristics of members of the adult population and their participation behavior.

Table 1 displays the participation rates of American adults (individuals 17 years old and over who were not full-time students) in organized continuing education during 1981 (Kay 1982). For

clarity, groups with a below-average participation rate (less than the population mean of 12.8 percent) are underlined. The data indicate that the elderly, blacks, and those with part-time jobs, low incomes, and low educational attainment are clearly underrepresented among participants in adult education. In addition, variations in participation rates according to geographic region and population density reveal potential disparities in the availability of or access to continuing education opportunities among American adults. Although changes in NCES survey methodology between 1969 and 1981 preclude direct comparisons of the collected data over time, the overall trend is that of increased levels of participation in adult education activities. Particularly noteworthy is the greater tendency of women, minorities, those residing outside of metropolitan areas, and those over 35 years old to participate in adult education.

As enlightening as such statistics are, they provide surprisingly little insight into what is clearly a complex phenomenon of multivariate origins (Boshier 1979). Clearly, the descriptive picture of the adult participant (or nonparticipant) that emerges from the literature is remarkably consistent. However, analytical findings are limited in number, based upon often dated information, and generally dependent upon relatively crude statistical manipulations of the available data.

A notable exception is Anderson and Darkenwald's (1979) reassessment of the 1975 NCES data base. Employing data collected on some 74,000 individuals, the researchers used stepwise regression of 11 independent variables (entered according to an inferred causal sequence) on the dichotomous dependent variable, participation/nonparticipation. Results of their analysis are summarized in table 2.

Their findings clearly indicate that, among the variables under scrutiny, years of schooling exert the single most important influence upon participation behavior. Of and by itself, educational attainment accounts for nearly a third of the explained variance in participation attributed to the independent variables included in the analysis.

Among the immutable demographic characteristics of individuals, age was shown to have the most significant impact upon participation—a predictably negative relationship some four to five times more powerful than either race or sex in explaining differences in participation. Sex and race did emerge as statistically significant, albeit weak, predictors of participatory behavior. Surprisingly, the observed independent effect of these variables tended to refute most of the prior assumptions regarding their influence. With the level of educational attainment, income, and other relevant variables controlled, blacks and women were shown to be more likely to participate in educational activities than their demographic counterparts (nonblacks and males).

Of the remaining seven independent variables included in the analysis, only four were considered by the researchers to be of practical significance. The two most important of these were both related to occupational status and the nature of the work setting. Predictably, high occupational status (professional/managerial employment) had a positive impact upon participation. Of equal influence in accounting for the explained variance in participation was the positive impact of employment in the human services sector. This new finding was attributed to the strong perceived need for continuing education operating among the members of this special segment of the work force. Income and community characteristics (suburban versus inner city or rural), like sex and race, exerted independent effects upon participation that, although statistically significant, were judged by the researchers to be of minor practical importance.

Despite the fact that all of the variables scrutinized demonstrated statistical significance as predictors of participation behavior, the proportion of explained variance accounted for by the primary regression equation was slightly less than 10 percent of the total. Commenting on this surprising finding, Anderson and Darkenwald drew the following generalizations:

TABLE 1

PARTICIPATION RATES IN ADULT EDUCATION BY SELECTED LEARNER CHARACTERISTICS, 1981

Characteristics	Participation Rate in Percent
AGE	
17-24	11.9
25-34	19.9
35-44	17.3
45-54	12.6
55-64	7.8
65 and over	3.1
SEX	
Male	12.0
Female	13.6
RACE	
Black	7.8
White	13.8
EDUCATION	
Elementary (0-8 years)	2.2
High School (1-3 years)	5.6
High School (4 years)	11.1
College (1-3 years)	19.6
College (4 years)	26.1
College (5 or more years)	31.1
FAMILY INCOME	
Under $10,000	6.2
$10,000 - $14,999	11.0
$15,000 - $24,999	13.4
$25,000 and over	17.5
LABOR FORCE STATUS	
Employed	16.8
Unemployed	11.2
Not in Labor Force	6.2
REGION	
Northeast	10.3
North Central	13.5
South	11.2
West	17.6
METROPOLITAN STATUS	
In Metropolitan Area	13.6
Not in Metropolitan Area	11.2

NOTE: Groups having below average (12.8 percent) participation rates are underlined.

SOURCE: Adapted from Kay (1982).

TABLE 2

SUMMARY OF MULTIPLE REGRESSION ANALYSIS: FACTORS AFFECTING PARTICIPATION IN AMERICAN ADULT EDUCATION

Independent Variable	Multiple R	Beta	F
Age	.18	.11	757.41**
Race (Black)	.19	.02	37.35**
Sex (Female)	.19	.03	47.89**
Schooling	.27	.13	947.53**
Occupational Status	.29	.08	393.31**
Human Service Employment	.30	.08	424.22**
Residence (West)	.30	.06	283.80**
Veteran's Benefits	.31	.06	270.64**
Community (Suburb)	.31	.02	42.42**
Income	.31	.02	17.76**
Employment Status (Full-Time)	.31	.01	6.01**

SOURCE: Adapted from Anderson and Darkenwald (1979).

> In terms of the sociodemographic characteristics such as sex, race, schooling, and so on, it is fair to conclude that people who participate in adult education are not on the whole much different from people who do not participate. . . . Thus, our understanding of the dynamics of participation . . . our ability to explain and predict (this phenomenon) is still very limited. Yet, without a better understanding of why people participate or do not participate . . . there is little prospect for identifying ways to enhance access to adult education and to minimize the personal and social costs of attrition. (pp. 7-8)

Implicit in their commentary is the need to understand other relevantly conceived variables and their relationship to adults' participation in educational activities.

Nondemographic Variables

In contrast to the national cross-sectional and longitudinal data explicating the relationship between demographic variables and adult participation in recurrent learning, the literature relating nondemographic variables to participation is relatively sparse and generally limited to local or regional perspectives on often unrepresentative segments of the adult population. Despite such shortcomings, there is ample evidence that certain situational, dispositional, and/or psychological characteristics of adults do indeed influence their participation behavior and may, in fact, be interrelated.

Employment-Related Factors

Regarding the situational characteristics of adults, the nature of one's employment has already been established as an important determinant of participation (Anderson and Darkenwald 1979). That the participation rate for individuals categorized as "professional, technical, and kindred workers" is some three times the average for the population as a whole (Kay 1982) supports the notion that the work setting and job responsibilities do indeed affect adults' inclinations to participate in educational activities. Focused studies conducted among lawyers (Taylor 1967), engineers (Wiegand 1966), nurses (Puetz 1980), pharmacists (Arndt, DeMuth, and Weinswig 1975), public health professionals (Callan, Parlette, and Leonard 1969), and physicians (Castle and Storey 1968) consistently report strong relationships between job-related factors and participation in continuing education activities. Even among adults in general, job-related factors emerge as the most influential of the many reasons given for engaging in learning activities (Carp, Peterson, and Roelfs 1974).

Although the characteristics of one's work undoubtedly exert an influence on participation behavior, employment-related perceptions may also be involved. In comparing adult evening school participants with their nonparticipant neighbors, Teichert (1969) found participants to be less satisfied with their current jobs and more inclined to anticipate a promotion or change in their occupational roles. Moreover, the participant group tended to look to the future with greater expectations of increased income and upward socioeconomic mobility. Nonparticipants, on the other hand, tended to be less career oriented, more complacent, and, by and large, more satisfied with the status quo than their counterparts.

Social Participation Factors

That such differences may manifest themselves in the larger sphere of social participation is relatively well documented. In reviewing the comparative literature on participants and nonparticipants, Rubenson (1977) concluded that it is mainly persons with a stimulating and active leisure who take part in adult education, regardless of educational background. Teichert's aforementioned study provides historical support for this thesis. Teichert found nonparticipants to be less restless, ambitious, and gregarious than their counterparts, spending a significantly lesser proportion of the leisure time outside of the home environment.

This relative social isolation of nonparticipants in educative activities was again demonstrated by Kobberdahl (1970). In this study, nonparticipants in adult basic education programs were found to be significantly *less* likely to exercise citizenship responsibilities, be active church members, and belong to voluntary organizations. Moreover, Kobberdahl found nonparticipants to be generally unaware of the available educational opportunities in their community. Similar findings among the aged (Fisher 1986), those of low socioeconomic status (London 1970; London, Wenkert, and Haggstrom 1963) and the adult population as a whole (Johnstone and Rivera 1965) provide strong empirical support for inclusion of "informational barriers" as one category of deterrent to participation, as previously argued by Darkenwald and Merriam (1982).

General support for the observed relationship between educational and social nonparticipation has been provided by both Lindamood (1975) and London, Wenkert, and Haggstrom (1963). Comparing participants and nonparticipants in an adult religious education program, Lindamood demonstrated that nonparticipants as a group (1) attended church less regularly, (2) belonged to fewer church organizations, (3) attended fewer church meetings, and (4) had fewer closer friends in the church. London, Wenkert, and Haggstrom's study provided the basis for broader generalization of these findings to the adult population as a whole, that is, those least likely to engage in general adult education activities exhibited delimited social participation, restricted friendship circles, and passive involvement in recreational pursuits.

Confounding the interpretation of these relationships are the conflicting results of studies in which personality factors are associated with participation behaviors. In the aforementioned study by Lindamood, those not engaging in church-related learning activities demonstrated significantly less integration of personality and self-esteem than those who did. Similar results were obtained among older adults in congregate living settings by Irby (1978); moreover, Sabbaghian (1979) demonstrated a strong positive correlation between adult college students' self-concept and their levels of self-directedness in learning. However, neither Jeghelian (1971) nor Rueter (1976) were able to demonstrate significant relationships between adults' personality or personality attributes and their participation or persistence in educational activities.

Psychosocial Factors

In contrast to studies using broad-based measures of personality factors, research focusing on more specific psychological orientations among delimited samples has generally produced more consistent findings. For example, Deboe (1980) demonstrated that feelings of powerlessness among low income adults were significant negative predictors of their proclivity to participate in organized adult education activities. Likewise, Fisher (1979) determined that older adults' levels of anomie were significantly higher among those who failed to engage in learning compared to those who did. Garry (1977) reported similar findings among a sample of blue-collar workers.

The belief that these psychological orientations may be related to the manner in which one perceives adult education finds additional support in the literature. In Garry's study, differences in adults' levels of anomie were *negatively* associated with favorable attitudes toward adult education, that is, nonparticipants (with higher anomie levels) exhibited less-favorable attitudes toward participation. Even among those characterized by high motivation, such as professionals, attitude toward continuing education is a potent predictor of the likelihood of participation (Bernardi 1975; Clark and Dickinson 1976; Southern 1980).

The potential importance of attitude toward adult education as a determinant of participation behavior is supported, in part, by studies of its conceptual antecedents. Among the conceptual antecedents of attitude toward adult education that have been scrutinized in the literature, perceptions regarding the worth of one's prior educational experience and the normative influence of one's reference group(s) are noteworthy.

A comparative study of U.S. Army servicemen conducted by Sida (1969) demonstrated that voluntary participants in a vocational training program tended to attach greater worth to their prior elementary and secondary school experiences than did nonparticipants. Rubenson (1977) emphasized the potential relationship between prior negative school experiences and the "valence" one places upon further participation. He further implied that the belief that engagement in adult education activities would not improve one's general living situation is among the most powerful psychological impediments to participation. Rubenson cautioned, however, that perceptions regarding one's early educational experiences assert themselves subsequently in one's level of educational attainment and may, therefore, tend to exert little effect if educational level is controlled as a variable. Indeed, adults' levels of educational aspirations are positively associated with their participation (Boyle 1967; Buttedahl 1974).

Lending support to Rubenson's observations, and providing an important perspective on the normative component of dispositional variables assumed to affect educational participation, is Murphy's (1977) analysis of participation of military personnel in public postsecondary educational programs. Assessing the relative importance of ability, socioeconomic status, prior education experience, and significant others' influence in discriminating between individuals categorized as either participants or nonparticipants in educational activities, Murphy found that variation in the influence of one's significant others exerted its effect independent of educational level. Evidence in support of these relationships among adults enrolled in GED preparatory programs was provided by Jones (1977); similar results among adult education students in general were reported by Frandson (1970).

Implications

In regard to the various models and paradigms of participation, the existing research provides clear substantiation for those theoretical perspectives that emphasize the interaction of both individual and environmental variables as determinants of adults' decisions to engage or not to engage in learning activities.

In terms of those factors attributable to the individual, the literature supports the emphasis given to status configuration variables, particularly as the logical antecedents of one's knowledge of or orientation toward learning opportunities.

With respect to environmentally determined factors, the literature suggests that many of the key components of existing models of participation, (participation opportunities [Cross], individual experience of need [Rubenson], and learning press [Darkenwald and Merriam]) represent either correlates or consequences of the situational and structural configuration of one's lifespace.

Notable mainly by its absence in the literature is clear substantiation for inclusion of the deterrents construct within those models of participation that emphasize its importance. Although the research does provide a relatively consistent portrayal of the variables associated with nonparticipation, few of these factors properly can be described as deterrents to participation. Clearly, demographic variables such as sex, marital status, age, and race are not, of and by themselves, deterrents to participation. More likely, it is the social and psychological correlates of these vital attributes that function to hinder or impede participation in adult education. Likewise, many of the situational variables related to nonparticipation, such as one's job role or employment status, probably exert their influence only by virtue of association with other, more relevant situational or dispositional factors. Of those few variables thus far scrutinized that logically could be categorized as deterrents to participation (low self-concept, unawareness of opportunities, negative attitude toward participation, lack of peer support), it is important to note that it is usually the *absence* or negative perception of the factor that characterizes it as an impediment to further learning.

The following section explores in depth current knowledge of those factors directly identified as deterrents to participation and concludes with a synthesis of the extant literature describing why adults fail to engage in recurrent learning efforts.

Factors Affecting Adults' Participation in Educational Activities

Complementing both the various theoretical perspectives on participation in adult education and the research devoted to identifying variables associated with such behavior is a substantial body of literature describing why adults fail to engage in continuing learning activities. Traditionally, the most common method used to identify these barriers or deterrents is simply to ask adults to specify (from a listing of obstacles) reasons contributing to their nonparticipation (Cross 1981). Because the items selected for inclusion in such surveys generally have been deduced by the researchers themselves and because reporting formats vary widely, research results are frequently not directly comparable. Moreover, since the survey method tends to reveal what people perceive, interview or questionnaire techniques that assess deterrents to participation provide a perceptual (rather than structural) understanding of impediments to learning. In addition, some methodological concerns have been raised regarding the validity of deterrents data collected by the survey method (Cross 1981). These concerns tend to focus on measurement problems (such as social response bias) and inappropriate data collection procedures (such as nonrandom sampling and sample attenuation).

Although such concerns are well-founded (and will subsequently be discussed), enough consistency exists between and among studies to provide a generalized picture of what people say deters them from participation in continuing education.

Evolution and Refinement of Deterrent Categories

This section elaborates on seven major studies that attempted to categorize and cluster perceived deterrents to participation.

Johnstone and Rivera

The earliest descriptive profile on factors deterring members of the adult population from participation in continuing education was provided by Johnstone and Rivera (1965). As one part of their four-phase inquiry into the nature of adult education in America, the researchers employed an interview technique to identify reasons given by nonparticipants for not attending adult education courses. Interviewees were shown 10 different statements and asked to indicate whether or not each statement or reason applied to them. As indicated in table 3, for both the total sample and those characterized as favorably disposed toward educational pursuits (persons with "high participation readiness"), cost, time, and stamina factors were most frequently identified as applicable constraints to attendance. Moreover, differences between those identified as having a high participation readiness and the sample as a whole suggested that attitudes toward adult education

TABLE 3

REASONS FOR NOT ATTENDING ADULT EDUCATION COURSES NATIONAL OPINION RESEARCH CENTER, 1965

Reason	Percent of Persons with High Participation Readiness	Percent of Total Sample	Percent Difference
Couldn't afford it	55	48	– 5
Too Busy	39	48	– 9
Too tired at night	37	45	– 8
Hard to get out of the house at night	31	35	– 4
Don't know of available courses	30	35	– 5
Not the studying type	20	34	–14
Courses don't sound interesting	11	17	– 7
Feel too old to learn	8	23	–15
Would feel childish	4	12	– 8
Don't need classes	4	12	– 8

SOURCE: Adapted from Johnstone and Rivera (1965).

affected the respondents' perceptions; in other words, those favorably disposed toward educational pursuits were consistently less likely to identify with each of the 10 reasons for not attending adult education courses.

Johnstone and Rivera intuitively divided the 10 discrete barrier or deterrent statements into 2 broad categories: those based upon influences external to the individual or beyond individual control (environmental or situational deterrents), and those based upon personal attitudes or dispositions toward participation (internal or dispositional deterrents). Subsequent survey research using self-administered questionnaires among rural adults (Apt 1975) and intensive probing interviews of enrollees and nonenrollees in a nontraditional postsecondary degree program (Marineau 1975) has provided support for this dichotomy of influence, and further corroborates the environmental/individual perspective espoused by most participation theorists.

Interestingly, those reasons categorized by Johnstone and Rivera as internal or dispositional in nature were consistently identified with less frequency than were the situational deterrents to participation. This dichotomy is most evident among those characterized as having a high participation readiness. Thirty percent or more of those favorably disposed to educational pursuits, identified cost, time, family responsibilities, or lack of information as constraints to attendance. Twenty percent or less of this subgroup cited the dispositional deterrents ("not the studying type," "feel too old to learn," "would feel childish," and "don't need classes") as reasons for nonparticipation. On the other hand, members of the sample as a whole identified with the dispositional statements two to three times more often than did those with high participation readiness. These findings suggest that perceptions regarding deterrents in general, and dispositional barriers in particular, are related to one's inclination for (or against) participation.

Elaborating upon the relationship between these situational and dispositional deterrents to participation and the demographic characteristics of their sample, Johnstone and Rivera uncovered significant differences in the number of impediments identified according to the sex, age, and socioeconomic status of the respondents. Women in the sample characteristically identified more situational deterrents to participation than their male counterparts and were particularly more likely to feel housebound than men. Although older individuals (those greater than 45) identified more total deterrents than their younger cohorts, the perceived impact of situational and dispositional constraints was observed to act differentially according to age, with younger members of the sample citing more situational barriers and older respondents more dispositional barriers.

Individuals in the lower socioeconomic status category mentioned both types of deterrents more frequently than members of either the middle or upper status groups. As expected, the frequency with which cost was identified as a deterrent to participation varied inversely with socioeconomic status, as did lack of knowledge of educational opportunities. Conversely, the time-related deterrent ("too busy to enroll") was directly related to socioeconomic status, mentioned some 12 percent more often by those in the high status category than by those occupying the lower class.

Particularly noteworthy was the observed interaction of socioeconomic status and age. Older individuals (of both sexes) in the lower socioeconomic category identified twice as many dispositional barriers to participation as their younger counterparts and some six to seven times the average number of deterrents perceived by younger, higher status individuals.

Unfortunately, because the data on deterrents to participation were collected solely from nonparticipants, Johnstone and Rivera were unable to explore the relationship between the perception of these factors and actual engagement in continuing education. Although other study results

(e.g., the finding that older adults and those occupying the lower socioeconomic strata of society were disproportionately represented among the nonparticipants in adult education) coincided with most of the observed differences in deterrent perceptions, the direct link between barriers and variations in participation could not be established. Moreover, the deterrent items analyzed were limited in number, deductively generated by the researchers themselves, and particularly prone to social response bias. Nonetheless, the research of Johnstone and Rivera provides a seminal perspective on the nature of deterrents to participation, the potential dimensions underlying their structure, and their differential influence upon selected segments of the adult population.

Carp, Peterson, and Roelfs

Some 10 years later, corroborating evidence on the nature of factors impinging upon adults' participation in educational activities was gathered by the Educational Testing Service for the Commission on Non-Traditional Study (Carp, Peterson, and Roelfs 1974). Of a nationally representative, weighted sample of some 3,900 adults, 3,000 "Would-be Learners" (those in the sample reporting an interest in some kind of further learning) were asked to identify from a list of 24 reasons all those perceived as important in keeping them from learning what they wanted to learn. Table 4 depicts the percentage of the sample that indicated each of the deterrents to participation.

Coinciding with Johnstone and Rivera's findings, Carp, Peterson, and Roelfs observed that financial costs and time restraints were the most widely reported deterrents to participation. Other time-related situational factors ("don't want to go to school full-time," "home responsibilities," "job responsibilities," and "amount of time required to complete program") were identified as deterrents by at least 20 percent of the sample. The remaining 18 situational and dispositional variables were cited by fewer than 1 out of every 5 respondents.

Like Johnstone and Rivera, Carp, Peterson, and Roelfs investigated the relationships between the frequency with which the various deterrents were reported and selected demographic characteristics of the sample. Significant differences in perceptions were identified between or among groups of respondents categorized by sex, age, race, and educational attainment.

Twice as many men as women reported job responsibilities as a deterrent to participation. The converse was observed regarding home responsibilities, and nearly 10 times as many women as men cited lack of child care as an obstacle to participation. Single women and those working outside the home reported job and time constraints as often as men, but women in general identified cost as an impediment more frequently than their male counterparts. Whereas men were inclined to mention time constraints more often than women, women (both housewives and nonhousewives) tended more frequently to cite "not enough energy or stamina." Moreover, women disproportionately reported fears that they were "too old to begin" learning as a reason for nonparticipation.

In terms of age of the respondents, cost was identified as a barrier to participation more frequently by those under 35 than their older counterparts. Younger respondents more often identified not wanting to go to school full time and being tired of school and classrooms as deterrents to further learning. Moreover, lacking confidence in one's learning ability (due to poor past academic performance) was cited as an obstacle three times as often by adults under 25 than by the older respondents in the sample. Deterrents of relative significance to middle-aged adults included not enough time (particularly among middle-aged men), and the responsibilities of home and children (reported nearly twice as often by women as by men). Perceptions of being too old to begin and not having enough stamina were observed to increase in frequency with age, particularly among women.

TABLE 4

BARRIERS KEEPING ADULTS FROM LEARNING WHAT THEY WANT TO LEARN, EDUCATIONAL TESTING SERVICE, 1974

Barrier	Percent of Would-Be Learners
Cost, including books, tuition, child care, etc.	53%
Not enough time	46
Don't want to go to school full-time	35
Home responsibilities	32
Job responsibilities	28
Amount of time required to complete program	21
Afraid that I'm too old to begin	17
Courses aren't scheduled when I can attend	16
No information about places or people offering what I want	16
Strict attendance requirements	15
Low grades in past, not confident of my ability	12
Courses I want don't seem to be available	12
No child care	11
Too much red tape in getting enrolled	10
Not enough energy or stamina	9
Don't enjoy studying	9
No transportation	8
No place to study or practice	7
Don't meet requirements to begin program	6
Tired of school, tired of classrooms	6
No way to get credit for a degree	5
Don't know what to learn or what it would lead to	5
Hesitate to seem too ambitious	3
Family or friends don't like idea	3
Other barrier	2
No response	3

NOTE: Percentages do not total 100 because of multiple responses.

SOURCE: Adapted from Carp, Peterson, and Roelfs (1974).

In regard to race, whites reported time and home responsibilities as barriers twice as frequently as nonwhites, and more commonly identified job responsibilities, not wanting to pursue full-time study, and not enjoying studying as deterrents to participation. Twice as many nonwhites as whites cited lack of confidence due to poor past academic performance and not meeting enrollment criteria as obstacles to learning. Access to study facilities, difficulties with transportation, cost, and lack of child care were disproportionately reported by nonwhites, with the latter two particularly significant deterrents for nonwhite women.

With education as a categorical variable, the researchers observed that those with less than a high school education were three times as likely as high school graduates to identify lack of confidence as a deterrent to participation. Significantly, no college graduate in the sample reported this variable as a barrier to further learning. Moreover, those with higher levels of educational attainment were also less likely than their counterparts to cite program enrollment requirements, dissatisfaction with studying, cost considerations, and age-related anxiety as obstacles to learning; as expected, this subgroup tended to perceive time-related constraints (i.e., job responsibilities, not enough time, amount of time required to complete programs, and inconvenient scheduling) as the major impediments to further learning.

In addition to substantiating many of the earlier findings of Johnstone and Rivera, the research of Carp, Peterson and Roelfs broadened our understanding of the factors impinging upon adults' participation in continuing education activities. By including more variables in their analysis, they provided a more detailed and elaborate portrayal of the various elements constituting the deterrents construct. By subsuming participants within the respondent sample, they provided evidence that those actually engaging in learning activities also face impediments to furthering their learning (corroborated subsequently by Veres and Reiss 1978). Moreover, by expanding upon the relationships between deterrents to participation and the demographic characteristics of adults, the researchers confirmed many heretofore speculative assumptions on the relative significance of such barriers within and among selected subgroupings of the population.

Methodologically, however, Carp, Peterson, and Roelfs' study shares many of the weaknesses characterizing the earlier research of Johnstone and Rivera. Although the investigators assessed the influence of a greater number of deterrents to participation, those chosen for analysis were still generated deductively by the researchers themselves. Many of the items so chosen, like those developed earlier, appear highly susceptible to social response bias. Moreover, because the reporting format provided for dichotomous responses only (important/not important), the relative magnitude of influence of the various deterrents could not be ascertained, thereby limiting treatment of the data to all but the most rudimentary types of statistical analysis. Most disappointing, however, was the researchers' failure to explore the relationships between deterrents and actual participation. Unlike Johnstone and Rivera's sample, the respondent grouping surveyed by Carp, Peterson, and Roelfs included participants in continuing education; the opportunity existed to assess such relationships but was never pursued.

Cross

Subsequent statewide and regional replication of the Educational Testing Service survey methodology (usually modified to meet specific agency needs) has provided substantive evidence in support of the reliability of its findings (Cross 1979). Synthesizing data gleaned from over 30 such studies, Cross developed a descriptive typology of barriers to adults' participation in organized learning activities, later (1981) incorporating the typology within her Chain-of-Response participation model (previously discussed).

Among the three categories of deterrents identified, i.e., situational, institutional, and dispositional, Cross observed that situational factors were consistently reported with the most frequency. In concert with the earlier findings of Johnstone and Rivera, and Carp, Peterson, and Roelfs, she observed that time- and cost-related constraints were the most often cited of all deterrents to participation. Typically (across studies), some 20 to 50 percent of the adults surveyed reported encountering these situational impediments to learning.

Cross further observed that those deterrents categorized as institutional in nature could generally be grouped into five clusters: (1) scheduling problems; (2) problems with location or transportation; (3) lack of interesting, practical, or relevant courses; (4) procedural problems related to enrollment, attendance, red tape, time requirements, and so forth; and (5) lack of information regarding procedures and/or programs. Of these, survey respondents most frequently identified inconvenient locations, scheduling problems, and lack of interesting or relevant programming as deterrents to participation. Typically, up to one quarter of those sampled cited such institutional factors as constraints to learning.

Deterrents classified by Cross as dispositional in nature (i.e., lack of ability, lack of interest, and so forth) were consistently cited by relatively few survey respondents. Typically, less than 2 percent of those sampled perceived such factors as deterrents to participation.

Cross (1979) attributed the comparatively low influence ascribed by respondents to dispositional deterrents to two potentially significant methodological problems characterizing the research: sample attenuation and response bias.

In many of the studies reviewed by Cross (including the aforementioned research of Carp, Peterson, and Roelfs), respondents who indicated that they were not interested in pursuing continuing education were systematically dropped from further analysis, thereby attenuating the sample. Clearly, excluding such individuals from analysis potentially lowered the frequency with which deterrents to participation, especially those categorized as dispositional in nature, were observed.

That dispositional deterrents are, in fact, more prevalent among those adults who do not participate in continuing education than those who do is substantiated in the literature. Nurnberger's (1974) profile analysis of northeastern New York State adults found that the only significant discriminators between users and nonusers of educational services were the self-perceptions of the respondents as learners. When compared to users, nonusers were significantly more likely to identify problems with enjoyment of studying, feelings of confidence, and knowing what they would like to learn. Because such individuals are probably among those least likely to participate in survey research, the problem of sample attenuation is potentially compounded by the issue of nonresponse bias.

In regard to bias in measurement of data obtained by self-reporting, Cross (1979) speculated that situational barriers (e.g., lack of time and money) tend to be more socially acceptable as reasons for nonparticipation than dispositional factors such as lack of ability or interest. If, in fact, social acceptability affects how individuals respond to self-reports of deterrents to participation (as suggested by Cross), the real importance of dispositional barriers may be underestimated. Indeed, evidence in support of this assumption does exist. When Wilcox, Saltford, and Veres (1975) asked Central New York State adults to cite deterrents to their own learning and concurrently to speculate on the reasons why other adults failed to engage in educational activities, lack of interest was reported as the leading obstacle attributed to others (26 percent), but less than 2 percent were willing to report that lack of interest deterred their own participation. Similar find-

ings were reported in the California community studies conducted by Peterson and Roelfs (1975) for the state legislature. The researchers found that community leaders, asked to identify what adult members of their communities perceived as barriers to participation, consistently mentioned dispositional barriers more often than the adults themselves.

Dao

In order to minimize the potential effects of social acceptability as a response bias to self-reports of deterrents to educational participation, Dao (1975) utilized a projective technique to study reasons for nonparticipation among a sample of 278 employees of 17 profit-making organizations. Using personal interviews and a literature review, the investigator first compiled a listing of some 550 reasons given by adults for nonparticipation in educative activities. These were analytically reduced to 88 deterrent statements and sorted by a panel of 24 expert judges. Applying latent partition analysis to the sorted statements, Dao derived the following nine clusters of reasons for nonparticipation:

1. Not enough time to participate in educational activities
2. Individual and personal problems make it too difficult to participate (e.g., poor transportation, cost, ill health, safety, and so forth)
3. Too difficult to succeed in educational activities (e.g., anxiety over instructional demands, insufficient time to devote to study, age-related concerns over learning abilities, fear of public failure, and so forth)
4. Against the social norms to participate in educational activities (e.g., general social disapproval, fear of ridicule by family or peers, and so forth)
5. Negative feelings toward the institution offering instruction
6. Negative prior experience in educational activities
7. Results of educational activities not valued (e.g., doubt that the learning will prove worthwhile, the conviction that experience is the best teacher, and so forth)
8. Indifference to educational activities
9. Unawareness of the availability of educational activities

The five most significant reasons in each of the above clusters were subsequently included in a Likert-type scale for administration to the survey sample. Respondents were asked to identify the frequency with which they perceived each reason influencing *other* people's decision(s) not to participate in educational activities. Although respondents were ostensibly reporting perceptions regarding others' behavior, it was assumed that the responses elicited would accurately reflect the perceptions of the respondents themselves.

In terms of the relative influence of the nine clusters on nonparticipation, lack of time (cluster 1) and indifference (cluster 8) were perceived by respondents as being the most significant. Cluster 7 was perceived third in importance, followed in order by clusters 2, 3, 5, 6 and 9. These latter five groupings of reasons were judged to be of only moderate influence and little difference was observed among their composite scores.

Cluster 4 was judged as being not influential. Cluster scores did vary according to selected demographic characteristics of the sample. The perceived influence of the clusters on nonparticipation was most strongly associated with the educational attainment of those surveyed; in general, the higher the level of schooling of the respondents, the less the magnitude of the cluster scores, particularly clusters 4, 5, 7, 8, and 9.

Cluster scores also varied according to the magnitude of the respondents' educational activities. Using the *Litchfield Activity Survey* (Litchfield 1965) as the measure of participant activity, Dao observed that those who engaged extensively in educational pursuits tended to perceive the social norm (4) and unawareness of opportunities (9) clusters as being the most influential reasons for nonparticipation, whereas those who engaged less frequently in learning considered the negative prior experience (6) and difficulty in succeeding (3) clusters as most potent. Treating the various cluster scores as predictors of educational activity, Dao found that only the difficulty in succeeding (3), social norm (4), negative prior experience (6), and unawareness of opportunities (9) clusters were significantly associated with variations in the respondents' range of participation.

Clearly, Dao's study provides an expanded perspective on the deterrents construct, particularly in regard to dispositional barriers to participation. Six of the nine clusters of reasons derived by the researcher (i.e., clusters 3, 4, 5, 6, 7, and 9) are best categorized as dispositional in nature, coinciding closely with the conceptual definition of "psychosocial" barriers to participation described by Darkenwald and Merriam (1982). Moreover, of the four deterrent clusters found significantly related to participation, three represented dispositional or psychosocial factors. Last, her findings clearly suggest that the deterrent frameworks intuitively constructed by Johnstone and Rivera (1965), Cross (1981), and Darkenwald and Merriam (1982) (two, three, and four components, respectively) may represent overly simplified conceptions of the factors deterring adults from participation in educational activities.

Other Studies

Three subsequent studies support the notion that the underlying configuration of the deterrent construct may not only be more complex than that previously assumed, but may also vary according to the characteristics of the group studied. Common to all of these studies is the use of sophisticated factor analytic methods to derive related groupings of variables associated with nonparticipation. Besides providing a more parsimonious picture of these multiple reasons for nonparticipation, such methods minimize the impact of social response bias, thereby providing a truer portrayal of what deters adults from participation in educational activities.

Shipp and McKenzie (1980) administered a 31-item deterrents scale to a stratified random sample of 678 nonparticipants in church-sponsored adult education programs. Scale analysis yielded seven deterrent factors:

1. Resistance to change and education
2. Alienation
3. Marginality
4. Social nonaffiliation

5. Perplexity/confusion

6. Program nonrelevance

7. Activity incompatibility

Scanlan and Darkenwald (1984) employed a similar approach to identify factors deterring a sample of health professionals from participation in continuing education. Principal components analysis of a 40-item Deterrents to Participation Scale (DPS), constructed inductively through both literature search and interview, yielded six major deterrent factors. In order of their importance in accounting for variance within the DPS, these six factors were given the following labels:

1. Disengagement

2. Lack of quality

3. Family constraints

4. Cost

5. Lack of benefit

6. Work constraints

The factor labeled "disengagement" consisted mainly of perceptions related to one's general level of activity and involvement, self-discipline, and orientation toward the desirability and importance of learning. Implicit in this grouping of variables were connotations of lack of inertia, boredom, uncertainty, diffidence, apathy, and alienation. The factor labeled "lack of quality" included variables associated with respondents' perceptions of program inadequacies, such as overall poor quality, inappropriate level or methods, lack of relevance. The factor labeled "family constraints" consisted of variables connoting competing priorities for time to fulfill the familial role. The factor labeled "cost" subsumed both direct *and* indirect cost variables, including the opportunity costs associated with employment leave. The factor labeled "lack of benefit" consisted mainly of perceptions questioning the relative worth and/or need for participation in organized continuing education. Lastly, the factor labeled "work constraints" included perceptions related to conflicting demands on the respondents' work time, particularly scheduling difficulties.

Of particular importance was Scanlan and Darkenwald's finding that among those items that had commonly been subsumed under the "situational" category of deterrents, three distinct source variables emerged: one related to occupational constraints, one to family constraints, and one to cost. Moreover, in regard to prior intuitive conceptions of "institutional" deterrents, judgments of benefit were observed as being conceptually distinct from perceptions of both cost and program quality.

In addition to providing a refined descriptive picture of the deterrents concept, Scanlan and Darkenwald provided the first convincing evidence of its validity. Using hierarchial regression analysis, the researchers were able to demonstrate that the six factors (in combination) could account for some 40 percent of the variance in the participation status of the respondents. Because previous attempts to predict participation using sociodemographic variables and/or motivational orientation factors proved disappointing, the authors concluded that the deterrent concept is one of the few identified that contributes meaningfully to explaining variance in the participation behavior of adults.

Cognizant of the limited generalizability of the Scanlan and Darkenwald study, Darkenwald and Valentine (1985) developed a generic form of the Deterrents to Participation Scale (DPS-G), administering it to a large and heterogeneous sample of the general adult public. Although six well-defined and conceptually meaningful factors also emerged in this analysis, their structure differed substantially from the original six DPS components; only one (cost) was identical. The remaining DPS-G factors (in order of relative importance) were (1) lack of confidence, (2) lack of course relevance (similar to the original DPS "lack of quality" factor), (3) time constraints (specific to course obligations, as opposed to family or work time competition as in the original DPS), (4) low personal priority (lack of motivation or interest in engaging in adult education), and (5) personal problems (family problems, including child care, health, and security).

Correlation of the DPS-G factor scores with the traditional sociodemographic variables of sex, age, educational attainment, total family income, and employment status yielded findings consistent with logical expectations, thereby supporting the validity of the identified factors. Moreover, these additional findings provide empirical support for the previously hypothesized impact of status configuration variables on one's perception of deterrents to participation (Darkenwald and Merriam 1982).

Current Perspectives

In combination with the research findings on the variables associated with adults' educational activity, these studies confirm most of the prior theoretical assumptions on the nature of deterrents to participation. Specifically, it is becoming increasingly apparent that "deterrents to participation" is a multidimensional concept, subsuming several logical groupings of psychological, social, and environmental variables. Also clear is the realization that these variables are associated with the perceptions of prospective learners. Additionally, it is evident that the perceived magnitude of these deterrent variables *is* associated with adults' participation behavior. Lastly, and of most practical importance, is the knowledge that the impact of these variables on participation behavior varies according to both the personal characteristics and life circumstances of the individual.

In regard to the dimensions of the deterrents construct, synthesis of the research findings suggests that at least six to nine factors can affect adults' participation in educational activities. These factors include groupings of discrete variables associated with the following categories:

- Individual, family, or home-related problems (e.g., child care, poor health, transportation difficulties)
- Cost concerns, including opportunity costs and lack of financial assistance
- Questionable worth, relevance, or quality of available educational opportunities
- Negative perceptions regarding the value of education in general, including those related to prior unfavorable experience
- Lack of motivation or indifference toward learning (e.g., anomie, apathy)
- Lack of self-confidence in one's learning abilities, including lack of social support/encouragement

- A general proclivity toward nonaffiliation (e.g., marginal involvement in social activities)
- Incompatibilities of time and/or place, especially those associated with conflicting demands of work

Regarding the differential impact of these various deterrent categories upon elements of the adult population, table 5 portrays our current understanding of their relative influence according to selected personal characteristics and life circumstances of adults in general.

Although our current knowledge is both tentative and incomplete, the emerging picture provides useful insight into the phenomenon of nonparticipation. By way of example, women (particularly single women with children) encounter deterrents to participation that are mainly situational in nature—family and home problems, cost, and time/place incompatibilities. For the elderly, on the other hand, deterrents appear to be mainly of psychosocial origin. Minority groups, those of low socioeconomic status, and those of low educational attainment (clearly interrelated factors) appear to be affected by a combination of situations and psychosocial and dispositional deterrents to participation. Implicit in these relationships is the potential interaction among various deterrent perceptions; for example, negative attitudes toward the value of education may influence one's perceptions regarding the worth, relevance, or quality of available opportunities. Clearly, more research is needed to confirm the differential impact of these deterrent factors and their potential interaction.

Notwithstanding these limitations, it is evident that a knowledge of these deterrent factors can and should be applied in planning and implementing educational opportunities for adult learners. How others have incorporated this knowledge into the general programming process, and how some have applied these concepts with targeted groups of adult learners is the focus of the next section.

TABLE 5

CURRENT PERSPECTIVES ON THE IMPACT OF DETERRENTS TO PARTICIPATION BY SELECTED ADULTS CHARACTERISTICS

Deterrent Category	ADULT CHARACTERISTICS				
	Sex (Female)	Age (Older)	Race (Non-White)	SES (Low)	Ed Level (Low)
1. Individual, family, home-related problems	+++	++	+++	++	++
2. Cost concerns	+++	+ / –	+++	+++	++
3. Questionable worth, relevance or quality	?	++	?	+	++
4. Negative perceptions re: value of education	?	+	+++	++	+++
5. Lack of motivation or indifference	?	++	?	?	++
6. Lack of confidence in learning abilities	++	+++	++	++	+++
7. Social nonaffiliation	?	++	?	+	?
8. Time/place incompatibilities	+++	++	+	++	–
9. Unawareness of opportunities	+	+++	++	++	++

KEY: (+) indicates a positive (direct) relationship; (–) indicates a negative (inverse) relationship; (?) indicates that either findings are inconsistent or unavailable. The number of (+)s or (–)s indicates the relative strength of the relationships according to current knowledge.

Strategies to Address Deterrents to Participation in Adult Education

To the extent that multiple factors deter adults from participation in learning and that these factors appear to have a differential impact upon groups of individuals according to their unique attributes or characteristics, no single strategy can be expected to be successful in overcoming their influence. Moreover, our evolving knowledge of the phenomenon of participation suggests that addressing deterrents to adults' engagement in educational activities must be based upon a clear understanding of the multiple variables and variable interactions influencing participatory decision making (Cross 1981; Darkenwald and Larson 1980).

Based upon these perspectives, this section initially will provide an overview of practical guidelines for addressing deterrents to participation in adult education. These guidelines evolve from both our developing knowledge of participation theory in general and the more specific application of marketing concepts to adult education programming. Subsequently, we will look closely at several examples of how these concepts have been successfully applied to overcome deterrents to participation among selected groups of "hard-to-reach" adults.

General Guidelines

Based upon application of the concepts underlying her Chain-of-Response Model, Cross (1981) identified several major guidelines for increasing participation in adult education activities. Due, in part, to the nature of her model and its emphasis on barriers as factors *external* to the individual, only one guideline directly addresses how to overcome deterrents to participation. However, in the context of our broadened understanding of the deterrents construct, essentially all of her recommendations provide insight into general strategies for addressing deterrents to participation.

Central to her model and of key importance in developing strategies to overcome deterrents to participation is the primacy and interrelationship of the antecedent factors of self-concept and attitude toward education. Associated with selected demographic variables and prior educational experiences, low self-concept (manifested in lack of confidence in one's learning abilities) and negative attitudes toward education represent powerful deterrents to adults' participation in educational activities among certain subgroups of the population, and potentially exert a strong influence on other perceptions related to the decision to engage or not to engage in educational activities. Indeed, Cross claimed that many of our failures to increase and sustain participation, particularly among the educationally disadvantaged, stem from inattention to these critical factors.

In regard to raising levels of self-confidence, Cross suggested that adult educators create more educational opportunities with low levels of risk or threat to prospective participants. Based upon a hypothesized continuum of adult learning activities according to their degree of threat,

Cross identified self-directed learning projects and televised courses taken by unregistered learners as formats most likely to attract those deterred by low levels of confidence or self-esteem. Moreover, Cross specifically recommended methods to reinforce participants' self-concept and enhance the learning environment, such as trusting, collaboration, assurance of ample time to master knowledge and skills, creation of positive learning experiences, and provision of non-threatening and useful feedback regarding performance. These methodological approaches are generally consistent with those espoused by Knowles (1980) in his approach to andragogy, and, more recently, by Wlodkowski (1985) in his application of motivational theory to adult education.

In terms of building more positive attitudes toward education, Cross recommended two concurrent strategies: (1) creating more positive personal experiences for more people early in their educational careers, and (2) tapping the support of prospective learners' "significant others." Efforts toward improving early learning experiences clearly represent a long-term strategy requiring collaboration with the elementary and secondary education community. On the short term, Cross recommended enlisting prospective learners' reference groups to overcome the deterrent of negative attitudes, particularly in initial recruitment efforts. Specific strategies focusing on this component include the extensive use of such word-of-mouth recruitment techniques as "each-one-bring-one" nights and exploiting voluntary organizations, work groups, and community memberships (Rubenson 1977). In order to supplement these strategies, Cross identified the need for more and better communication to individuals and groups, particularly that necessary to convey a positive image of adult learning to underrepresented segments of the population.

In order to address deterrent factors related to the perceived relevance of adult education, Cross reiterated the traditional dictum that adult learning experiences should be designed to meet the goals and expectations of the learners. In doing so, however, she called into question much of the conventional wisdom regarding current approaches to needs assessment, and concurrently raised several important philosophical and ethical questions related to enhancing motivation for learning and meeting broader societal needs. On a more practical basis, Cross related recent research on adult development and learning, particularly that emphasizing life transitions as a "trigger" for learning (Aslanian and Brickell 1980), to forces impelling or impeding adults' participation in educational activities. Specifically, she suggested that adult educators who can develop programming that is responsive to such "teachable moments" can do much to address deterrents related to perceptions of irrelevancy. Moreover, by capitalizing on these trigger events, adult educators may be able to offset the impact of other potential deterrents to participation, thereby carrying individuals over barriers that might thwart those with less motivation toward or expectation of achieving the desired goal(s).

In addressing the broad categories of situational and institutional deterrents to participation (individual, family, and home-related problems; cost; and time/place accessibility) Cross referred to numerous specific examples of institutional efforts in both the United States (Cross and Zusman 1977; Ruyle and Geiselman 1974; Valley 1976) and Great Britain (McIntosh and Woodley 1975) to mitigate or remove these factors and, simultaneously, open new opportunities for adult learners otherwise impeded from engaging in continuing learning efforts. A summary of these strategies appears in table 6.

As the critical link in bringing potential learners and providers together, Cross identified the need for provision of accurate, timely, and appropriate information as the key in bridging communication-related deterrents to participation. According to Cross, no matter how motivated an individual is, nor how great the opportunities are, if effective communication does not occur, prospective learners will remain unserved. Moreover, Cross insisted that communication will be effective only to the extent that (1) it reaches the targeted group or individual and (2) its message

TABLE 6

STRATEGIES TO ADDRESS SITUATIONAL AND INSTITUTIONAL DETERRENTS

Deterrent	Administrative Accommodations	Teaching/Learning Considerations	Student Services	Educational Evaluation
Time incompatibility	Alternative scheduling	Distance teaching Independent study Mass media Experiential learning		Credit by examination Assessment of experiential learning
Place incompatibility	Provision of convenient locations	Distance teaching Independent study Mass media	Work site service service provision Satellite service centers Traditional loans, grants Employer sponsorship Free tuition	
Lack of appropriate information/guidance or support	Extended hours for counseling	Orientation programs	Provision of brokerage services Development of advocacy or support groups	Assessment of learner interests/needs
Individual, family or home problems	Alternative scheduling	Distance teaching Mass media Independent study	Provision of transportation Provision of child care Provision of career services	

SOURCE: Adapted from Cross and Zusman (1977).

is specifically designed to address the particular needs, expectations, and concerns of those to whom it is directed. From this perspective, the use of effective methods of communicating to prospective learners serves not only to overcome informational barriers, but also provides the basis for addressing negative attitudes, lack of motivation, and questions of worth, value, or relevancy. Good guidance on the use of communication to *influence* rather than simply inform prospective learners was provided by Larson (1980).

Taking a somewhat different approach to addressing factors deterring adults from participation in continuing education, Beder (1980) applied traditional marketing concepts as the basis for reaching "hard-to-reach" learners. Relying heavily upon the work of Kotler (1974), Beder defined marketing as an approach to program planning and development in which *all* elements of the program are manipulated to inform, motivate, and meet the needs of prospective clients or participants. As such, strategies to identify and address deterrents to participation represent only one component of the model. Nonetheless, marketing strategies provide useful insight for those intent upon minimizing impediments to adult learning.

As applied to adult education, marketing theory treats the relationship between provider and client as one of exchange, whereby the prospective learner gives something of value (e.g., time and/or money) in return for something valued equally or more (e.g., new knowledge, skills, or sensitivities). According to this framework, the more value learners receive or expect to receive in proportion to what is given up, the more likely they are to participate and/or persist in the effort. In its simplest sense, therefore, marketing seeks to provide to prospective learners or participants the greatest possible value per unit of organizational effort. Ideally, both provider and learner receive maximum benefit—the provider by attracting and serving more clients, the learner by gaining the valued abilities at a worthwhile cost.

On the surface, the marketing approach appears heavily founded upon the aforementioned economic decision-making model of participation espoused by Dhanidina and Griffith (1975). On the contrary, marketing represents a proactive means of attending to the multiple variables affecting an adult's decision to engage or not to engage in a learning activity *and* the differential impact of these factors on selected segments of the population.

Central to the application of marketing concepts to adult education are two key processes: market analysis and program "orchestration." Market analysis roughly corresponds to the traditional programming step of needs assessment, but is more sophisticated in its methodology and subsumes a broader context. Key components of market analysis are (1) market segmentation, (2) consumer or clientele analysis, and (3) assessment of the competition.

Market segmentation divides potential participants into fairly homogeneous groups or categories based upon how we would expect them to respond to selected programming efforts. By way of example, the educationally disadvantaged, the elderly, rural adults, and reentry women all represent distinct segments of the "market," all with unique needs and expectations, and all facing different combinations of constraints to participation.

Consumer or clientele analysis begins where market analysis leaves off; that is, once the market is logically segmented, efforts are made to delineate relevant needs, motivating factors, constraints, and appropriate methods of communicating with the prospective target group. Implicit in this component of the marketing model is the differentiation of overt versus latent needs; the assessment of attitudes, values, and perceptions (especially the provider or program image); and the determination of the current state of satisfaction with or demand for the programming in question.

It is in the area of assessing demand that deterrents to participation assume critical importance in the marketing model. As described by Beder (1980), states of negative demand and no demand potentially involve factors deterring adults from engaging in the planned or proposed learning activity. A state of negative demand exists when prospective learners are aware of the opportunity but dislike it or purposefully seek to avoid it. Deterrents likely to be operating under negative demand are mainly dispositional in nature and include negative attitudes toward education or opinions of its questionable worth, relevance, or quality. Creating demand under such circumstances would require that providers employ persuasive communication to enhance the image of the programming and directly address the attitudes of the prospective learners (as described previously by Cross).

A state of no demand exists when prospective learners are indifferent to the programming: they neither desire it nor seek to avoid it. Deterrents likely to be operating under no demand situations include lack of motivation or indifference, judgments of inappropriateness or irrelevance, and unawareness of the opportunity. Creating demand under no demand situations would require that providers establish a clear link between the goals and expectations of the prospective learners and the ability of the programming to meet these perceived needs. Moreover, effective communication techniques would normally be needed to ensure that this linkage is established. Kotler (1974) labeled this approach as "stimulation marketing."

The last step in market analysis is assessment of the "competition." As applied to adult education programming, competition refers to the various opportunities and the options available to prospective learners to fulfill their needs. Analysis of *enterprise* competition among adult education providers can provide useful insight into how other agencies are responding to various deterrents to participation. This type of analysis will be provided later in this section via descriptions of successful efforts to overcome deterrents among selected hard-to-reach segments of the adult population.

Other forms of competition include generic and product-form competition. As explained by Beder, generic competition pertains to the broad product categories that address the same client need(s). By way of example, Beder identified three representative options that could meet the needs of chronically unemployed individuals desiring employment: (1) becoming an ACTION volunteer, (2) entering a job skills program like CETA, or (3) relocating to a full-employment area of the country. From the perspective of the agency providing the job skills programming, the very existence of alternative options to meet the same client need represents a potential deterrent to prospective learners' participation. Indeed, alternative options (self-study and on-the-job training) were among the variables associated with the "lack of benefit" factor identified by Scanlan and Darkenwald (1984) as a deterrent to health professionals' participation in formal continuing education activities.

Analysis of product-form competition can also yield information useful in identifying and addressing deterrents to participation. This type of analysis would focus on variations in comparable program "packaging" of schedules, teaching/learning methods, facilities, support services, and so forth and would attempt to identify that combination of attributes most likely to attract the targeted market segment. Obviously, identifying and manipulating desirable and undesirable elements of a program addresses both incentives for and deterrents to participation. This is the essence of the second major component of the marketing approach—program "orchestration."

According to Beder, the purpose of program orchestration is to provide programming that optimizes participation by best satisfying learner needs and demands. Program orchestration is achieved by establishing the appropriate "marketing mix" of price, product, place, promotion, and

partners. In assessing each of these major marketing strategies and their appropriate mix, due attention must be given to those factors identified through market analysis as deterring participation.

With cost consistently identified as a major deterrent factor, lowering the price of programming would seem to be the most logical way to address this barrier, especially among the economically disadvantaged. Interestingly, what little empirical evidence there is on the impact of fee structures on participation (Boshier and Baker 1979) fails to support this assumption. From the marketing perspective, this apparent incongruency is easily explained—program fees represent only one element of price. According to Beder, price is more appropriately conceived to include the total value of *all* that is foregone in order to participate in the educational activity. Indeed, the deterrent factors identified and labeled "cost" by both Scanlan and Darkenwald (1984) and Darkenwald and Valentine (1985) included several elements, only one of which was actual course fees. Among the related cost variables are indirect expenses such as food and travel or materials, and the "opportunity cost" of loss of income attributable to job leave.

Because these hidden costs can actually outweigh the fees charged (Beder 1980), efforts to reduce their impact must be included in any comprehensive strategy to address cost-related deterrents to participation. The use of communication technologies, especially among professional and technical workers, is one way to obviate travel-related costs (Chamberlain 1980). Methods to minimize opportunity costs as deterrents to participation include integrating programming within the work setting and using more time-efficient and flexible methods of delivery, such as computer-assisted instruction. The choice of such strategies, of course, depends upon the characteristics of the target market and the resources of the provider.

The second major component of the marketing mix is product. From a marketing perspective, product includes both tangible and augmented elements. The tangible product is the actual course, program, or workshop offered to the target market. The augmented product represents the *total* meaning the activity has to participants or prospective learners. With perceptions of questionable worth, relevance, and quality representing one major category of deterrents to adults' participation in educational activities, providers intent upon addressing this factor must take into account both components of product.

In terms of the tangible product, as previously suggested by Cross (1981), program design should reflect the needs and expectations of the prospective learners. Given the number of market segments constituting the adult population and the vast array of alternative programming structures and methods available to the adult educator, following this simple dictum could represent a formidable undertaking. The application of generic program design models, as described by Kasworm (1983), can do much to simplify the process and further aid providers in addressing both quality-related and dispositional deterrents to participation.

The three generic program design models described by Kasworm are the Learner-Generative Model, the Instructional Systems Model, and the Learner-Educator Collaborative Model. The various assumptions and elements underlying each of these models are summarized in table 7. Central to the application of these models in developing educational programming is the recognition that different needs require different approaches. For example, the Learner-Generative Model has proved effective with learners who have had significant negative experiences with past learning, who distrust educational activities or the educational establishment, or whose self-concept has been influenced by environmental oppression and powerlessness. The Instructional Systems Model, on the other hand, has demonstrated value in the design and implementation of programming for adults in need of developing discrete knowledge and skills for a particular task setting, job requirement, or certification standard (Kasworm 1983). Clearly, perceptions of qual-

TABLE 7

GENERIC PROGRAM PLANNING MODELS

Program Element	Instructional Program Models		
	Learner Generative Model	Instructional Systems Model	Learner-Educator Collaborative Model
Learning	Tranformational, humanizing	Theoretical, cognitive, controlled	Facilitating change from present learning levels to desired levels
Design	Knowledge, application, reflection, reflexivity	Systematic and sequential, based on empirical data	Articulating learner groups' and content specialists' needs in mutually negotiated goals
Process	Authentic, problem-posing learning strategies	Predetermined events, focused skills with definable outcomes	Mutually negotiating learning goals, activities, and outcomes
Subject Matter	Learners' needs and priorities within their culture and environment	Systematic analysis provding classification of instructional objectives	Identified by group, clarified by content expert, refined and designed by the educator
Learning Outcomes	Developmental needs, exploratory learning, or problem-solving changes	Specific measurable knowledge of predetermined content	Balance of learner needs, and task requirements
Educator's Role	Provide learning environment based on the learner	Demonstrate skills to develop effectively sequenced and segmented learning	Aid learner group and educative organization to define and design the learning experience
Examples	Educationally disadvantaged	High technology professionals, military education	Cooperative extension

SOURCE: Adapted from Kasworm (1983).

ity, worth, and benefits stem, in part, from the degree of congruence established between the program model and the needs and expectations of past or potential learners. By implication, the use of an inappropriate programming model can serve as a deterrent to participation among the targeted clientele. In establishing congruence between "product" design and learner needs and expectations, providers can do much to minimize perceptions of lack of worth, relevance, or quality and potentially alter attitudes toward future participation.

Although knowledge or perceptions of the tangible product are obviously an important factor in an adult's decision to engage or not to engage in an educational activity, full understanding of participation behavior necessitates consideration of the activity's *total* meaning as an augmented product to prospective participants. In considering the total meaning of an adult education activity, providers must understand that factors other than the desire to gain new knowledge or skills can have a powerful influence on adults' participation behavior. Over 20 years of motivational research have confirmed that numerous orientations toward learning exist among members of the adult population (Cross 1981) and that these motives must be taken into account in the program planning process. For example, the primary motivational orientation for participation among some segments of the adult population is the opportunity to fulfill a need for personal associations and friendships. Providers who attend to this augmented component of the product are likely to be more successful in attracting this segment of the market than those who do not. From the perspective of deterrents to participation, providers failing to address the augmented elements of the product may unknowingly be creating perceptions of questionable worth or relevance among prospective learners. Obviously, without the knowledge gained by careful market analysis, it is difficult, if not impossible, to address deterrents to participation associated with the augmented product perceptions of prospective learners.

Other than its obvious relationship to accessibility and cost-related deterrents to participation, the market element of *place* carries significant potential as a contributing factor in adults' dispositions toward learning. Perhaps the best example of how place can contribute to the disposition deterrents to adults' participation in learning activities occurs among the educationally disadvantaged, particularly those with past negative experiences in elementary or secondary school (Mezirow, Darkenwald, and Knox 1975). Bringing learners back into the physical environment that characterized their prior failures can have a devastating impact on their perceptions of the educational climate, even with due consideration given to other relevant elements of the marketing mix. Place is also influential in attracting or deterring more affluent professionals to participate in continuing education. In assessing physicians' opinions about where the best continuing education activities could be encountered, Snelbecker, Ball, and Roszkowski (1982) found that resort sites were consistently identified as the preferred locus for learning *and* as the place most likely to satisfy their demands for a quality experience. According to the respondents, these settings provided the desired opportunity to alternate between study and recreation. From a deterrents perspective, it is interesting to note that the opportunity to be at a major medical school was ranked *lowest* on the scale of characteristics of good continuing education experiences. Although for clearly different reasons, placement of the activity in the academic setting represents a potential deterrent to the participation of these two disparate groups of adult learners. Such a deterrent reinforces the importance of place as a crucial marketing factor.

As the fourth major element in the marketing mix, *promotion* consists of all consciously planned activities designed to communicate persuasively, to inform potential learners, and to motivate their participation (Beder 1980). Kotler (1974) identified five major forms of promotional activity: advertising, publicity, personal contact, incentives, and atmospherics.

In concert with Cross' orientation toward the provision of accurate, timely, and appropriate information to prospective learners, promotional efforts serve first to obviate deterrents associated with adults' unawareness of educational opportunities, usually through such one-way communication channels as advertising and publicity. However, changing negative attitudes or enhancing motivation usually require more than these common impersonal approaches to promotion. Personal contact is required. As subsequent examples will show, incorporating personal contact into one's recruitment plan represents an essential element of successful efforts to reach adults deterred from participation by dispositional or motivational factors. In combination with word-of-mouth support elicited through learners' reference groups, personal contact can have a powerful influence on those otherwise unwilling to participate.

Supplementing these promotional techniques are value-added incentives such as giving stipends to job trainees or awarding Continuing Education Units (CEUs) to professionals. The intent of using such incentives is to strengthen the behavioral response toward the programming and, where necessary, counterbalance what might be extant barriers or deterrents operating to impede participation. Similarly, atmospherics—altering the ambiance of the setting—can make participation more appealing to potential learners, overcoming what might otherwise be negative perceptions of place.

The last element of the marketing mix described by Beder is *partners*, the purposeful establishment of interagency relationships to facilitate participation and service delivery. Basing his recommendations upon Lauffer's (1977) work in the area of human and social services, Beder suggested that the best method to reach effectively these adults otherwise deterred from participation in needed educational activities is to work closely with other organizations and agencies that have been successful in attracting these groups. Both joint sponsorship and interagency referral methods have proved effective and mutually beneficial to involved partners, particularly in the area of community-based adult basic education programming (Beder and Smith 1977). Moreover, it is only through agency cooperation that most organizations can provide the supportive services such as counseling, child care, and transportation that so often impinge upon adults' abilities to engage in continuing learning activities.

Whether applying the concepts underlying participation theory (Cross), or using the more pragmatic approaches of marketing (Beder), it should be clear to providers that deterrents to adults' participation in educational activities can be identified and that, in concept, methods exist to minimize or eliminate their influence. How these various concepts have been applied in practice to address deterrents among selected subgroups of the adult population is the focus of the remainder of this section.

Successful Approaches Addressing Deterrents to Participation

The literature is replete with successful examples of how providers have addressed deterrents to participation in adult education. Given the number and variety of these approaches, it is useful to categorize them according to the specific segment of the population served. For illustrative purposes, four representative groups of hard-to-reach learners have been chosen: "reentry" women, the elderly, the educationally disadvantaged, and those living in rural areas. Although substantial overlap can and does exist among these groups, and none is truly homogeneous in regard to its characteristics, it is clear that different deterrent factors tend to affect these groups in different ways. Indeed, as both participation theory and marketing analysis would claim, it is only by careful assessment of the unique attributes of a given segment of the population that we can expect to identify and address deterrents to their participation in adult education.

Reentry Women

Reentry women are usually defined as those desiring to continue their education after a substantial leave, commonly associated with child rearing or family responsibilities. Although the purposes of reentry are diverse, career preparation and personal development are the most frequent reasons given by these women for continuing their education (Grossberg 1981). The major factors deterring reentry women from pursuit of additional education include those evolving from diminished self-concept or self-confidence, home-related problems, unawareness of educational opportunities, and incompatibilities of time and/or place (Ekstrom 1972; Henshaw 1980; Nolan 1980). Cost may also deter participation, particularly among single parents.

Programs successful in addressing these deterrents and preparing reentry women for career and/or life transitions generally have taken a holistic approach to the problem, treating education per se as only one need among many ("Women and Adult Education" 1980). As suggested by O'Neill and Spellman (1983), program planning for reentry women should take into account the following broad objectives:

- Raising self-esteem
- Developing intellectual and personal autonomy
- Helping women understand the use of power
- Helping women prepare to resume interrupted careers
- Teaching women the special skills required for career advancement, including sponsorship
- Helping women cope with role conflict and aloneness
- Promoting physical and emotional well-being
- Providing women with the skills necessary to cope with discrimination

Implicit in these objectives is the establishment of a learning environment free of threat and considerate of the influence of prior socialization upon women's traditional orientations toward their roles (Farmer and Backer 1975). Because reentry requires both appropriate information *and* support, emphasis is placed first on counseling and group-oriented activities designed to address attitudes and values that may be contributing to negative selfconcepts or lack of confidence in personal goal-setting (Gayfer 1980; Hughes and Kennedy 1983; Mohsenin 1980). Following this "bridging" component, prospective learners are better prepared to articulate and address specific instrumental or expressive needs through appropriate coursework. Successful programming usually supplements these activities with selected support services like child care, while assisting learners in establishing the formal and informal network ties necessary to achieve the desired goal(s) (Sullivan 1981). Often, employer sponsorship and work-site activities are provided to obviate cost and scheduling-related deterrents to participation, especially for reentry women seeking career opportunities or advancement.

Cirksena, Hereth, and Costick (1977) provided an overview of current issues and efforts involved in addressing the needs of reentry women. Good examples of programming that has been successful in addressing deterrents to participation include the Women's Education Development

Incentive Program (WENDI) at Brevard Community College in Florida (Forrest 1981), Women in Business, Inc. (O'Neill and Spellman 1983), the Career Development Women's Studies Program at Cornell University (Nelson, n.d.), and the Women's Mobile Campus Program described by Maxeiner, Nelson, and Klinger (1982). Although these efforts differ in regard to sponsorship and emphasis (i.e., career versus personal development), all are characterized by sensitivity to the multiple constraints limiting women's ability to continue their education. Such sensitivity is the hallmark of successful programming for reentry women.

The Elderly

Conceptions regarding learning and aging have changed dramatically over the last 20 years. Conventional wisdom notwithstanding, research has consistently demonstrated that the elderly not only have explicit educational needs, but also exhibit both the motivation for and ability to address these needs (Knox 1977; McCluskey 1974; Peterson 1983). Yet the aged remain among the most underrepresented segment of the population participating in adult education (Heisel, Darkenwald, and Anderson 1981; Kay 1982).

In part, this observed disparity is attributable to the numerous deterrent factors affecting the elderly's participation in educational activities. Among the deterrents most likely to have an impact upon the elderly are those related to negative self-image or diminished self-concept, personal problems (particularly poor health), unawareness of appropriate opportunities, questionable relevance of extant programming, cost, limited accessibility, social nonaffiliation, and security concerns (Coe and Barnhill 1965; Goodrow 1975; Kelly 1974; Knox 1977; Monk 1977; Spencer 1980; Trager 1976; Wood and Associates, n.d.).

Overcoming these numerous deterrents to older adults' participation requires that programming be direct, personal, and accessible (Robinson 1983; Spencer 1980). *Directness* is achieved by establishing linkages with the elderly community, usually with and through agencies sharing a complementary commitment to the aged. Spencer (1980) identified nine categories of organizations and agencies whose missions involve service to the aged and, depending upon the purpose of the educational activity, would be likely to engage in collaborative recruitment and programming. Besides having obvious contacts and credibility within the elder community, such agencies can help provide the special resources necessary to address many of the aforementioned deterrents to participation, such as personal and informational counseling, health services, transportation, and funding.

Personal programming for the elderly attempts to address dispositional deterrents to participation by providing a supportive and responsive learning environment, with due attention to individual needs, expectations and concerns (Hixson 1969; Spencer 1980). Such a climate is established by providing for physical comfort and mutual trust and respect among participants, and giving learners a share of the responsibility for prioritizing and planning their activities (Knowles 1980; Peterson 1983). Moreover, learning experiences must be designed to address shortcomings associated with such physiological changes characterizing the aging process as loss of hearing, diminished visual activity, and so forth (Knox 1977). Last, if dispositions are to be changed, providers should employ learning processes that capitalize on the wealth of life experiences that older adults typically bring to bear on their learning activities. Indeed, only by emphasizing process over content can providers expect to alter long-standing negative conceptions of self and the relevance of organized educational experiences.

Finally, by providing *accessible* programming, providers can do much to overcome deterrents related to time/place incompatibilities, while simultaneously addressing personal problems and

security concerns as impediments to participation (Peterson 1983). Through collaborative linkages, appropriate community sites can be identified and employed for programming. Such sites should be convenient and familiar to prospective learners and have facilities commensurate with the needs of older adults (e.g., adequate lighting or elevators). Scheduling should be based upon identified priorities among those targeted, and account for common conflicts or otherwise unforeseen circumstances such as foul weather. In addition, transportation should be considered an integral component of the programming, especially among the rural elderly (Spencer 1980).

Programs successfully employing these various strategies are as numerous as the different educational needs and expectations they address. Among the most comprehensive and long-standing is the Institute of Study for Older Adults (ISOA) at New York City Community College (Spencer 1980). Beyond bringing education to older adults in the communities it serves, ISOA strives to stimulate and train others to address the educational needs of the elderly, including the aged themselves. Six major components constitute the ISOA program: liberal arts instruction, an ethnic heritage program, a consumer education program, a homebound program, a retirement training program, and an information and referral service. Relying heavily upon a network of community linkages, ISOA's small staff is able to reach large numbers of prospective learners through collaborating agencies and organizations. Programming is coordinated through these linkages, with planning and recruitment done by educational committees composed of representative elderly. By direct involvement of those most familiar with the participating organization or agency, ISOA is able to address many of the deterrents characterizing that particular group and tailor its approach to the unique needs, expectations, and concerns of its members. Moreover, besides offering numerous opportunities for participants to continue their learning, ISOA makes extensive use of the elderly as recruiters, counselors, and teachers. By employing indigenous members of the targeted population as role models, ISOA is making appropriate use of significant others as a vehicle for enhancing the self-image of prospective participants and ensuring the relevance and worth of its offerings. In combination, these approaches have manifested themselves in both high levels of demand and satisfaction among the population served—both indices of success in addressing deterrents to participation.

The Educationally Disadvantaged

If completion of secondary school is considered the benchmark measure of minimal educational achievement, the educationally disadvantaged constitute some 65 million adults lacking a high school diploma. Most occupy the lower strata of the socioeconomic ladder and are disproportionately represented among minority groups, especially blacks and Hispanics (Anderson and Darkenwald 1979).

Although cost-related factors obviously play a role in deterring the educationally disadvantaged from participation in educational activities, lack of self-confidence, low self-esteem, and negative attitudes toward education predominate (Anderson and Niemi 1970; Irish 1980; Mezirow, Darkenwald, and Knox 1975; Moore 1970). Compounding these factors are informational deterrents associated with low verbal facility and/or foreign language barriers. Clearly, in terms of both the number and magnitude of factors involved, addressing deterrents to participation among the educationally disadvantaged represents a formidable challenge—a challenge requiring an integrated and comprehensive approach to both recruitment and programming.

Underlying any approach to addressing deterrents to participation among members of this group is the fundamental assumption that the educationally disadvantaged can be reached only through community-based strategies (Baker 1983; Hunter and Harman 1979). Implicit in this

perspective is the notion that recruitment efforts must be founded upon strong community linkages and the use of significant others, and that programming must attend to the identification and solution of problems with which community members hold a sense of ownership (Mezirow and Irish 1974).

Recruitment strategies should function not only to inform prospective learners of available opportunities (thereby addressing unawareness-related deterrents), but must also serve to enhance motivation and alter previously acquired negative attitudes. Mass media approaches to promotion are particularly useful in conveying information and, when properly designed (e.g., positive testimonials on TV or radio, newspaper features on successful graduates), may provide motivational inducements. Likewise, referral mechanisms among agencies serving this population can develop better awareness of educational opportunities and potentially affect prospective learners' conceptions of their needs and/or goals. However, the educationally disadvantaged seldom use the mass media as a source of information for solving their problems and tend to be distrustful of guidance provided by formal organizations (Mezirow, Darkenwald, and Knox 1975). Moreover, neither mass media nor referral strategies can address the underlying negative perceptions the educationally disadvantaged hold of education and schooling.

Recruitment strategies designed to address deterrents to participation among the least educated adults must therefore incorporate personal contact as a component of the promotional effort (Irish 1980; Snyder 1971). Personal contact is most effective when members of the local community serve as recruiters (Mezirow, Darkenwald, and Knox 1975). Such individuals can draw on existing networks of personal contacts and, as demonstrated with the elderly, can exert a powerful influence on prospective learners' dispositions toward both themselves and learning (Irish 1980).

Of and by itself, however, recruitment cannot directly address deterrents related to the questionable worth, value, or relevance of an educational experience. Only by providing programming that truly meets the needs and expectations of prospective learners can providers hope to break the vicious cycle created by poor past experiences with the educational system. As previously discussed, the Learner Generative Model (Kasworm 1983) provides the basis for developing such programming.

Irish (1980) identified three model program efforts designed, in part, to overcome deterrents to participation characterizing the least-educated members of society. Although each project employed a different approach, and the emphasis was more on recruitment than programming, together they provide useful insight on addressing the special problem encountered by providers attempting to reach the educationally disadvantaged.

Project Reach, a 2-year demonstration program conducted at the University of Notre Dame, was designed to determine the most cost-effective ways of recruiting the educationally disadvantaged. Results of the project indicated that door-to-door canvassing by project staff was the most effective method of stimulating enrollment in adult basic education (ABE) classes among those targeted, with mass media approaches (radio and television spots) having a negligible impact (McClelland 1972).

The Adult Armchair Education Project, sponsored by the Opportunities Industrialization Center in Philadelphia, targeted the educationally disadvantaged in a economically depressed and racially segregated area of the city. Recruitment focused on both door-to-door canvassing and word-of-mouth recruitment by community-based learning "hosts." These learning hosts sponsored armchair courses in their homes for anyone in the immediate neighborhood who wished to attend. Ten weeks in duration, these armchair courses served as "feeder" or "vestibule" classes, designed,

in part, to ease learning group members' transition into more formal settings. Although learning group activities addressed basic skills development, the primary focus was on consumer-related problem solving and community action rather than on content. The success with which this project was able to address the factors deterring its clientele from participation was evident in its enrollments—in terms of both the number of learners and number of study groups, the project exceeded its target goals by nearly 100 percent (Irish 1980).

Project POR-FIN (Program Organizing Related Family Instruction in the Neighborhood) focused on the recruitment of neighborhood Hispanics into ABE and English-as-a-second-language programming offered in a community center. Trained bilingual recruiters were used to establish contact with parents of children enrolled in the local school. Recruiter training emphasized development of effective communication skills, including techniques for persuading and motivating listeners. Moreover, recruiters were equipped with concrete information of potential utility to their audience (e.g., how to get needed social services). Last, recruiters did not approach households "cold," but rather used available knowledge about the community and/or family being targeted as well as follow-up on initial contacts twice over a 2-week period. In comparison to promotion using conventional mail flyers among a control group, *15 times* as many adults contacted by the recruiters enrolled in the programming. Unfortunately, attrition in both groups was characteristically high, indicating insufficient attention to the programming component of the model, especially its affective aspects (Phillips, Bellorado, and Margold 1985).

In combination, these experiences clearly indicate that deterrents to participation among the educationally disadvantaged can be addressed by integrating recruitment and programming strategies grounded on both theory and sound practice techniques.

Rural Adults

Like so many of the hard-to-reach, rural adults are characteristically underrepresented among participants in adult education (Anderson and Darkenwald 1979; Kay 1982). This finding is usually attributed to problems of accessibility, in particular geographic distance and inadequate transportation. Although inaccessibility is certainly a deterrent factor among rural adults, other forces impinge upon their willingness or desire to participate in educational activities. Among these are dispositional deterrents related to comparatively low levels of educational attainment, institutional deterrents arising from a lack of support services, and situational deterrents related to competing priorities among job and family (Copa 1976; Marineau 1975; McCannon 1983; Waldron 1968). Compounding these factors among low-socioeconomic status rural adults are cost concerns, and among rural women, a lack of support within the family.

A fundamental assumption underlying efforts to address these deterrents to participation is that rural adult education must be considered an integral part of rural development; that is, it must be firmly rooted in the surroundings and daily lives of its prospective participants and should focus on local problems and their solution (McCannon 1983). As a component of rural development, adult education must integrate advisement, counseling, and supportive service components within its programming and, where necessary, provide "bridging" functions for individuals deterred by negative past experiences or diminished self-concept. Moreover, prospective learners must be reached, informed, and motivated in appropriate ways, and those who desire to participate must not be deterred by barriers of time and/or place.

In terms of instrumental needs, particularly those related to farming and agribusiness, the Cooperative Extension Service (CES) stands out as the most successful model of its kind, not only

for rural education, but for adult education as a whole. The demonstrated success of the CES is based upon the sound integration of promotional and programming strategies, using productivity and profit as major motivational inducements. Annual work plans rely on grassroots input from local county committees and advisory groups. Heavy emphasis is placed on the use of local resources and facilities and collaboration among existing formal and informal community groups. Extension agents provide the framework for and facilitate solution of practical problems of immediate concern to those participating, in essence, applying the key elements of the Learner-Educator Collaborative Model described by Kasworm (1983) and depicted in table 7. Admittedly, the success of the CES stems in part, from its long-standing financial support by the federal government and the many related privileges it enjoys. Nonetheless, its sound approach to the special problems of educational delivery in rural settings has gained for the CES recognition as the prototypical model for rural development.

Perhaps due to the success of the CES in addressing the instrumental needs of its clientele, most rural dwellers indicate unmet needs for more expressive-oriented education, especially that related to personal growth and development. Programming successful in meeting these needs and addressing related deterrents to participation has generally taken a community-based approach to the problem, collaborating with local agencies for purposes of recruitment and support services (Maes and Draves 1981; Walker 1981). Given the scarcity of resources characterizing many rural environments, collaboration among service agencies with a commitment to rural development is often the key to successful outreach (McCannon 1983).

McCannon identified several examples of community-based programs that have demonstrated success in reaching their targeted clientele. Among these are the rural education program at the University of Alaska (Walker 1981); the University for Man at Kansas State University (Maes and Draves 1981); the Southern Appalachian Labor School in Montgomery, West Virginia; the Southeast Community College Outreach Program in Cumberland, Kentucky; and the Colorado Mountain College residential/community-based centers in western Colorado. Although each program addresses a different clientele, provides for different needs, and employs different logistical approaches to the problems of promoting and delivering rural education, all are characterized by a community orientation tailored to local needs and dependent upon partnership arrangements with existing service agencies. Moreover, each of these programs incorporates informational resources and counseling services as an integral component of its total educational plan. More recently, Kirkwood Community College in Cedar Rapids, Iowa, and the University of Minnesota's Project ENLIST (Educational Network Linking Institutions, Students, and Technology) have enhanced their capacity to obviate geographic barriers to participation by the use of telecommunications technology.

Conclusion

Although it is clear from the foregoing analysis that our current knowledge of factors deterring adults from participation is incomplete, there is sufficient support in both theory and practice to substantiate inclusion of the deterrents concept as a valid determinant of adults' educational behavior.

For providers of adult education, the numerous examples of successful practice convincingly demonstrate that one can overcome or minimize the impact of deterrents to participation that selectively affect groups of prospective learners. Characterizing all these efforts has been careful preliminary planning that focuses on both the selection and design of appropriate methods of recruitment and programming. Underlying all providers' planning has been the use of existing theoretical knowledge on educational participation and its practical manifestations, for example, the marketing approach. Most significant is the common observation that successful providers pay attention to the needs, expectations, and concerns of their prospective clientele, using their resources in logical ways to make participation in their programming as easy and meaningful as possible.

For policymakers, several critical issues have been raised. Are sanctions necessary to "induce" participation? What are the ethical issues involved in affecting adults' motivations? Who shall pay for the additional resources necessary to address these deterrent factors? Should the problem be addressed in elementary and secondary education? These are but a few of the policy issues that must be addressed.

For scholars, it is apparent that more and better research on participation behavior is needed. The groundwork has been laid, but key questions remain to be answered. Only in this context can true progress be made and adult education providers and policymakers alike be confident in their ability to make informed decisions and fulfill their important role in our educational system.

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